



# **Software Development Release Notes**

**Last update: Thursday, 03 December 2020**

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**Modification as at release 11.01.05a**

- 1) Due to a bug, multi-selection of files from file system was not working from a number of places. This bug is fixed on this release.
- 2) When converting word documents to PDF, Synergy was prompting to save the document if it was an active document. This was causing extra clicks when it was not needed. We have ensured that converting word documents to PDF would not prompt for saving of the word document.
- 3) When converting master word documents containing replacement symbols, Synergy was asking for replacement symbols despite the fact that those replacement symbols would not have been useful. We have removed prompting of the replacement symbols when master word documents with replacement symbols are converted to PDF.
- 4) Customers can keep track of matter activity using a housekeeping setting. However, this information was not being displayed anywhere in the user interface. We are now displaying the last event that has happened for a matter in the matter edit form. For active matters, the information will be displayed on the summary tab. For the approved matters, the information will be displayed on the production tab.

The screenshot shows the 'Edit Workflow: 55767 (In progress)' window with the 'Summary' tab selected. The window contains various fields for client information, workflow details, and financials. A red box highlights the 'Activated On' field, which displays '25/11/2020 14:55:21.270000 By: System Administrator'.

Field	Value
Client ID	
Client name	
Year	2020
Client rating	Standard
Is this a master?	<input type="checkbox"/>
Workflow type	
Description list	
Description	
Date received	06/11/2020
Target date	06/02/2021
Activated On	25/11/2020 14:55:21.270000 By: System Administrator
Importance	20 Percent Chance
Responsibility	
Secondary Resp	
Approval by	
Assigned by	
Quantity	1
Price	0.00
Dept.	(n/a)
Time budget	\$0.00
Disbursement budget	\$0.00
Current reserve amount	\$0.00

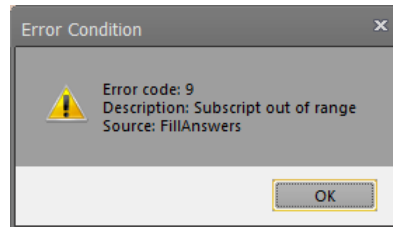
Buttons at the bottom: ☐ Do not contact client directly, Approve, Save, Exit.

The screenshot shows the 'Edit Workflow: 55767 (Approved)' window with the 'Production' tab selected. The window contains fields for production details. A red box highlights the 'Approved On' field, which displays '26/11/2020 16:10:05.300000 By: System Administrator'.

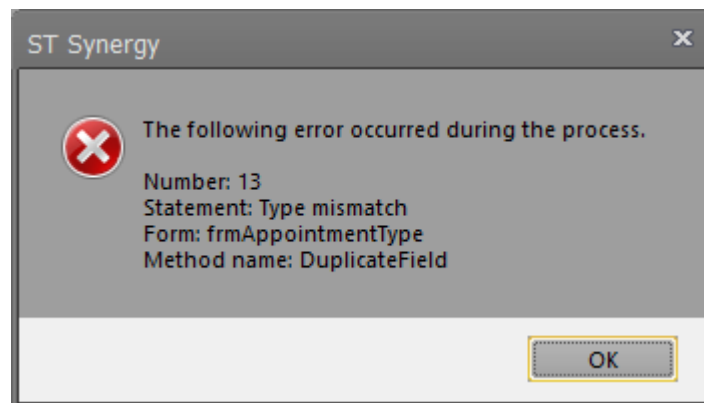
Field	Value
Entered by	
Completion date	26/11/2020
Approved On	26/11/2020 16:10:05.300000 By: System Administrator
Comments	
Production notes	

Buttons at the bottom: ☐ Do not contact client directly, Unapprove, Save, Exit.

- 5) When editing a task from Matter Control Centre, sometimes Synergy was displaying the following error twice before displaying the task details. Please note that this error will not cause any malfunction in the way tasks are handled as questions and answers are properties of master matters. Nevertheless, this was due to a bug in displaying answers that was stored in Synergy database. This error is fixed on this minor release.



- 6) When creating an appointment type, in some occasions it was throwing an error message. This was due to mismatched type on appointment category identifier during the duplicate detection process. This is fixed on this minor release.



**Modification as at release 11.01.05**

- 1) In Synergy, users can change client type form many different places. Client type can be changed as part of processing workflows. It can also be changed manually from Client Control Centre and other places. There was no reliable way of determining the exact date of the client type change. One could look at the activity status or account number change date but these rely on certain features to be turned on and the records not to be deleted manually by users. In this version, we have added a new table to keep a history of client type changes. This history table will have columns to indicate what change has happened (from and to client type), who has done this (the user), when it was done (date and time), and finally whether this was performed as part of a workflow process (which matter number). The history of the client conversions can be seen from the Client Control Centre.

The screenshot shows the 'Client Control Centre' window. It has a menu bar with 'Additional data', 'Ext. Info.', 'Chronology', and 'Zones/Resp'. Below the menu is a tabbed interface with 'General' selected. The 'General' tab contains fields for 'Company ID', 'Tax file number', 'ACN number', 'Incorp. date', and 'ABN'. There are also buttons for 'Change ID' and 'AKA'. On the right, there are dropdown menus for 'Home', 'Work', 'Fax', 'Mobile', 'E-mail', 'Pager', and 'VOIP'. At the bottom, there are buttons for 'Change type' (highlighted with a red box), 'Address dep.', 'Contact dep.', 'Billing dep.', 'Go to web site', and 'Business names'. There is also a 'Postal Address' dropdown and buttons for 'Transfer', 'Report', 'Active', 'Quick contact', 'Add', 'Edit', and 'Delete'.

The screenshot shows the 'Client Type Conversion History' window. It has a title bar with a close button. Below the title bar is a label 'Client type conversion history...'. Below the label is a table with the following columns: 'From', 'To', 'By', 'Date', and 'Workflow'. The table has several rows of data, but they are all blank. At the bottom right of the window is an 'OK' button.

From	To	By	Date	Workflow

- 2) Customers may not want to track client conversion history for all client types. Only a handful of client type conversions may be of interest. To indicate which clients type conversions should be tracked by Synergy, Software Development Kit and Client Synchronisation program, Administrators will



need to edit the client type from housekeeping and check the **Keep history of client type changes from/to this type** check box.

The screenshot shows the 'Add Client Definition' dialog box with the 'General' tab active. The 'Keep history of client type changes from/to this type' checkbox is checked and highlighted with a red rectangle. Other visible fields include Description, Default client status, Default follow-up, Default prefix, and Default suffix. There are also checkboxes for 'Allow zone and territory data capture', 'Enforce entry of the business name', 'Include in telephone register', 'Inactive', 'Allow creation of quick contact', 'Mark for external system synchronisation', and 'Restrict association to those defined as valid association'.

Once this is done, a history record will be written in the following cases:

- When a new client of this type is created.
  - When a client type is changed from another type to this type.
  - When a client type is changed from this type to another type.
- 3) We have fixed a bug in Client Synchronisation Server. It was not adding or updating client details when the following housekeeping option was set to anything other than Mix Case.

The screenshot shows the 'Company Defaults' dialog box with the 'List items' tab active. The 'Enforce text casing for client details' option is highlighted with a red rectangle. A sub-dialog box 'Enforce Text Casing For Client Details' is open, showing 'Mixed case' selected in the 'Select option' dropdown. The main list includes various settings like 'Client unbilled time and disbursement checking option for invoice approval', 'Default facsimile coversheet', 'Default scanner setting', 'Default setting for approved workflow display in Client Control Centre', 'Select default address type for automated link to zones', 'Select default task status for search', 'Related client option for Work Centre follow-ups', 'Maximum wait for Office applications to load', 'Maximum size limit for EMail attachments', 'Enforce text casing for client details', 'Disable workflow description', 'Enter address validation Web API user password', 'Select address types that needs validating using Web API', 'Enter address matching referer', 'Enter address matching count', and 'Enter interval in seconds for refreshing user status'.

- 4) Synergy allowed library text to be linked as the source of matter description as well as the client name. It also allows the very same library text to be used as the source of additional data fields. Some customers wanted the ability to match the matter description or client name when they were creating new additional data rows when the same library text was being used as source of the matter/client description/name and an additional data field. This will reduce possible input errors immensely. It will also improve user efficiency greatly specially when the library text contains too many entries in the list. In this version we have extended the additional data field definition to allow this.

User defined item

ID  ☒ Display in list view ☐ Prevent updates

Description

Select data from Librray Text

Data type Text Mixed case

Maximum length 0 ☐ Input is mandatory

Picture format  ☐ Keep change history

Default value

Minimum value

Maximum value

Mouse hover text

☐ Has list

List value Inactive

☒ Select linked entity description from list if possible

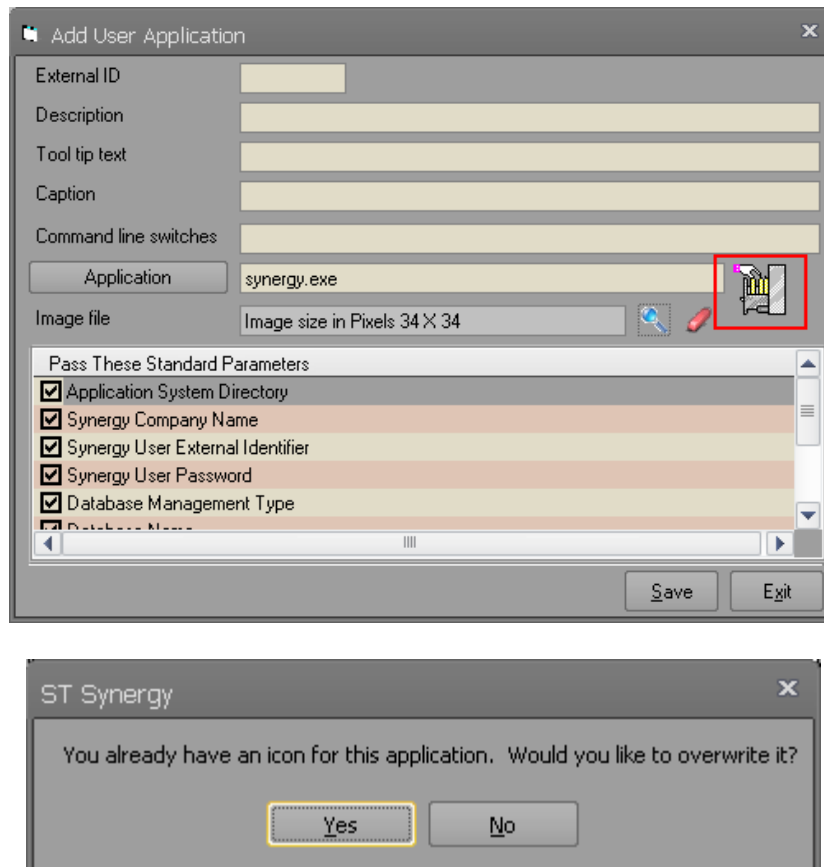
Default information Entity description

Save Exit

Please note that this matching is only applicable to library text additional data fields. In addition to that, the additional data field must include a specific library text selected otherwise the matching will not be performed. This is done so that only those matters/client types with matching library text source are used for matching. Our Software Development Kit is also amended to consider this new setting. Please note that the drop down will not be disabled so that users can still make other choices if they wish. If matter/client detail is

not present in the list, it will be added to the list. This is done because the library text entries can be inactivated and inactive entries will not be displayed in the additional data form. This allows the matching to work correctly for creating additional data for matters/clients that were created before inactivation of the library text entry.

- 5) When adding/editing user applications, some clients have asked us to provide facility to keep the existing icon if there is one. We have done this on this version. If Synergy finds an icon in the form, then the user has to confirm before the icon is overwritten.



- 6) We have made some changes for additional data field history as follows:
- Additional data auditing was not working correctly for date fields. This is fixed now.
  - When keeping additional data field history, Synergy was not setting the other fields to null in the database table. For example, if a change to a text fields was being added to the table, the number and date fields were not being set to null. This has been fixed on this version.
  - We have added some more fields to the additional data history table so that our clients can determine who made the change, which machine the change was made from as well as the date and time that change was done. The upgrade date and time, machine name that upgrade was done, and the user name that is doing the upgrade (usually System Administrator) will be used as default values.

- The additional data field history was not keeping the old value correctly in some scenarios. This has been fixed on this version.

The screenshot shows the 'User defined item' dialog box. The 'Data type' dropdown is set to 'Date' and is highlighted with a red box. The 'Keep change history' checkbox is checked and also highlighted with a red box. Other fields include ID, Description, Select data from (set to {n/a}), Maximum length (10), Picture format, Default value, Minimum value, Maximum value, Mouse hover text, Has list, and Default information. There are 'Save' and 'Exit' buttons at the bottom.

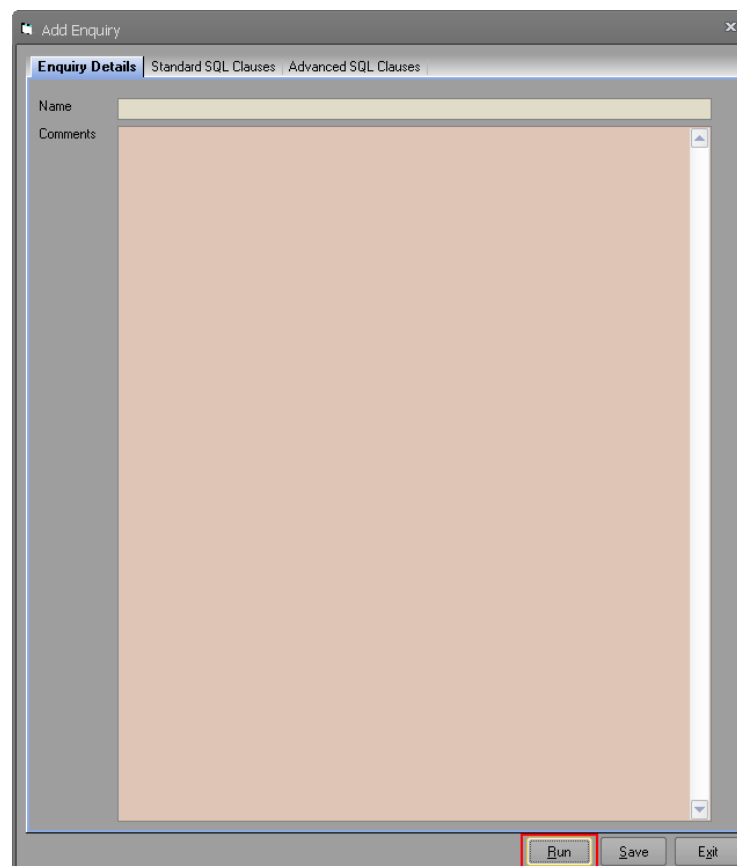
- 7) We have made the company upgrade form resizable as well as adding the SQL Server name to the list.

The screenshot shows the 'ST Synergy - 11.01.05' application window. The 'Server' tab is selected in the top navigation bar, which is highlighted with a red box. The main area displays a list of company names with checkboxes. The 'Site license details' section is visible below the list. The right sidebar contains buttons for 'New', 'Locate', 'Change Path', 'Blank Database', 'Upgrade', 'Full Reindex', 'Build Relationships', 'Edit', 'Delete', 'Take Offline', and 'Capacity'. The bottom of the window has 'License...' and 'OK' buttons.

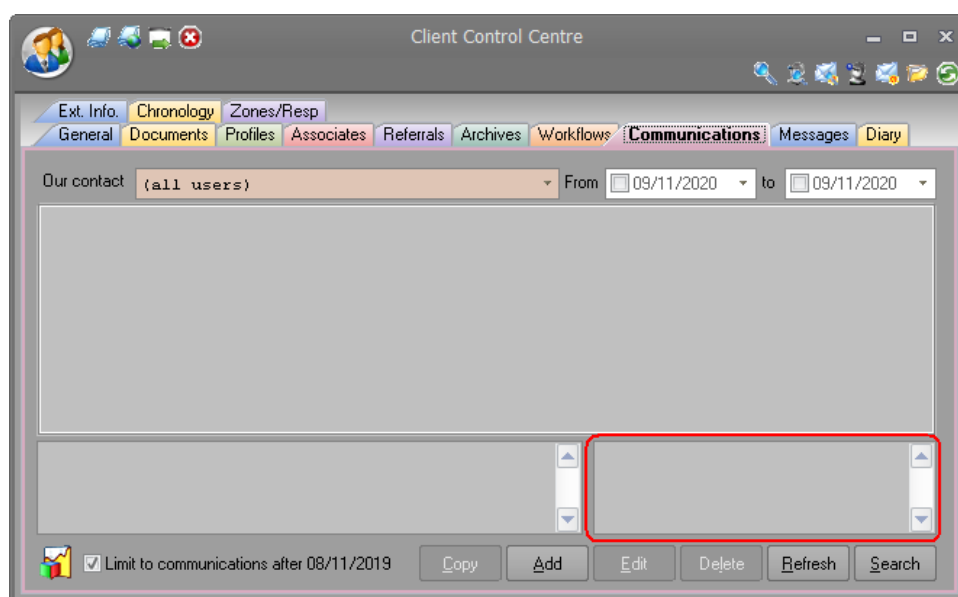
- 8) When additional data columns had list values, the validation of value was not working correctly in cases where data was being imported from external sources. This validation was not trimming spaces and also was considering casing which is not the original design was meant to do. We have changed the validation of additional data column values for those that have a list to ignore casing as well as removing leading and trailing spaces before matching the value against the list entry.
- 9) We have added Windows 10 White and Red skins in this version. Other windows 10 colour schemes (Gray, Gold, and Black) may be added in the future versions.



- 10) When testing some queries, Synergy was not testing from clause of a query parts correctly. This was due to incorrect detection of table names and table aliases. This bug is fixed on this version.

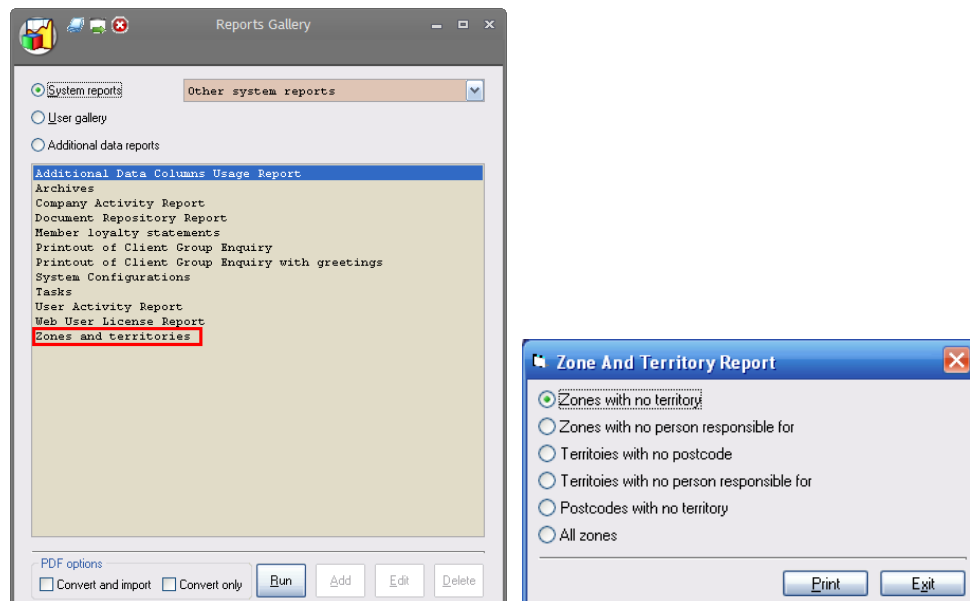


- 11) The first and last contact details in the communication tab of the Client Control Centre were not refreshing as users were adding/editing communications. This has been fixed.

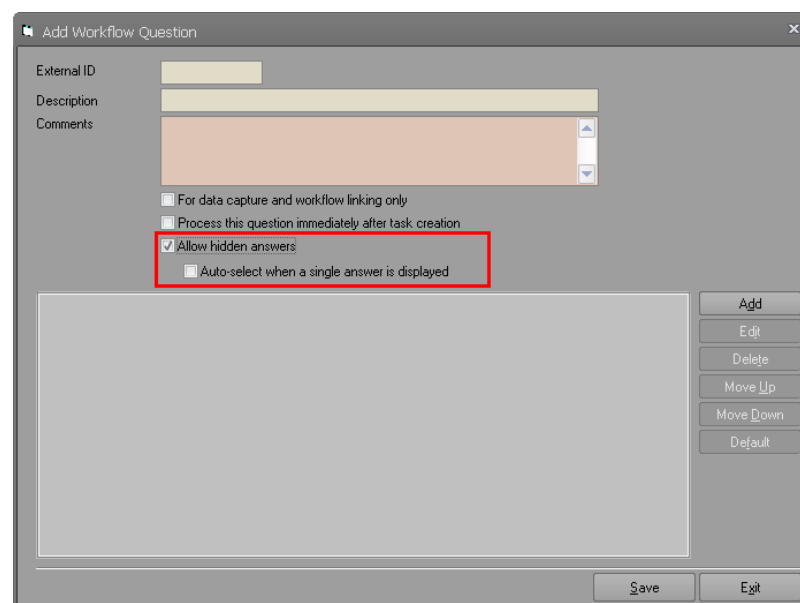


**Modification as at release 11.01.04**

- 1) There was a bug in the “**Zones and territories**” standard report. This was due to a syntax error in the query statement. This has been fixed now.

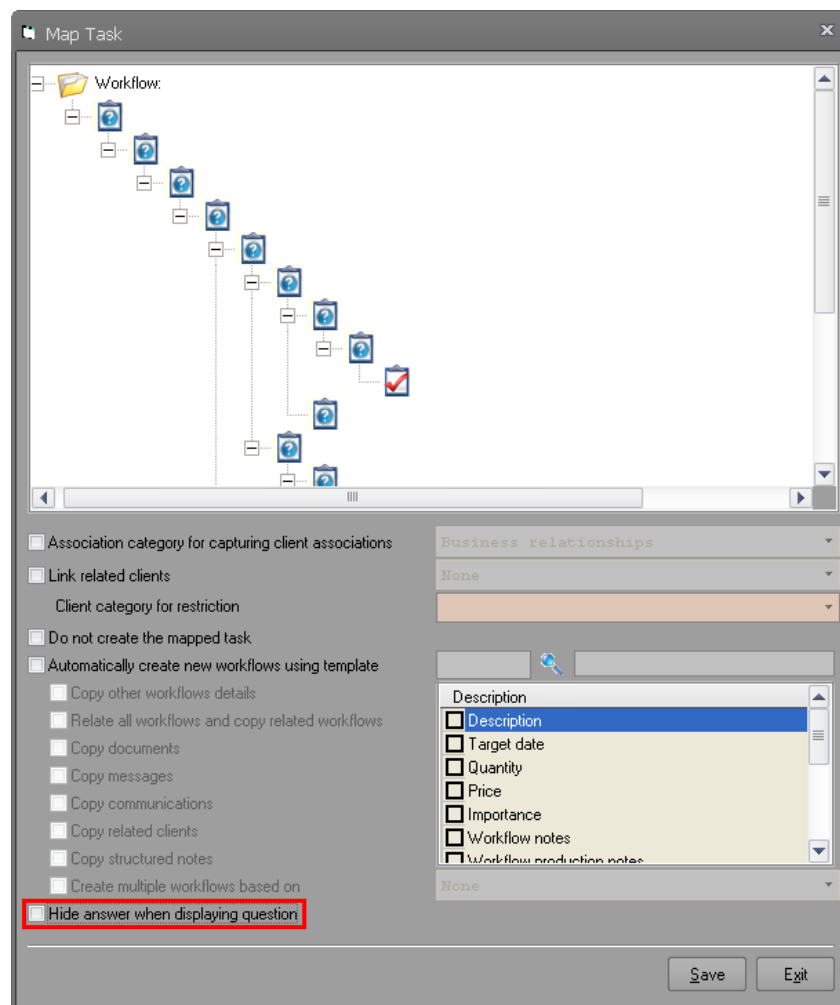


- 2) When decisions are involved in a matter, to simplify the master matter setup, many clients have decided to share questions among different master matters. In these scenarios, there may be cases where not all answers are relevant for a specific master matter. Synergy had no feature to allow such answers to be hidden from the users in those master matters. In this version, we have provided facility to cater for hiding of answers on specific master matters. To do this, the administrators will need to allow answers to be hidden for a question by ticking “**Allow hidden answers**” check box when setting the question.



By hiding answers, it is possible to end up displaying a single answer on some matters. In this case, given that there is only one answer, administrators may want to auto-select the answer to streamline the workflow process rather than forcing users to click the save button. To allow Synergy to do this, you need to tick “**Auto-select when a single answer is displayed**” check box. Obviously, you should not do this if you need your users to select a reason during this process

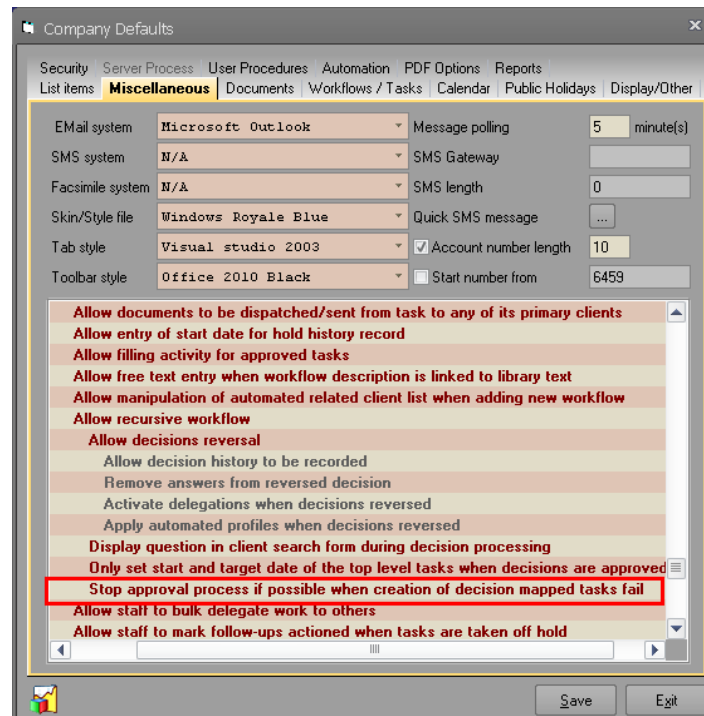
Once you have allowed answers to be hidden, you need to specify which answer must be hidden on a specific master matter. This can be configured when mapping an answer to a task node by selecting “**Hide answer when displaying question**” check box. Once this is done, that answer will not be displayed to the user.



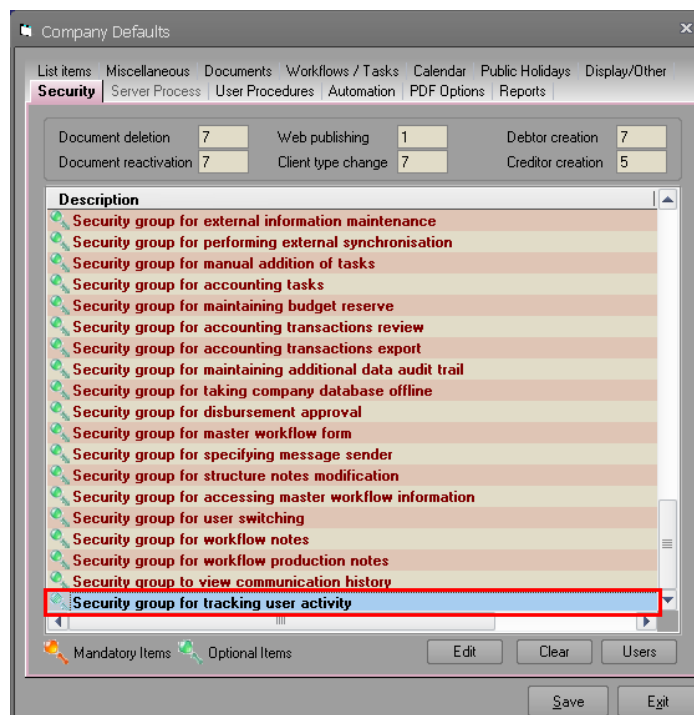
- 3) In previous version, when a decision task leads to multiple data capture questions, when users were clicking on exit button from the answer selection form, Synergy was proceeding with asking the other questions. In this version we have placed a setting in company defaults form that allows Synergy to abandon the process if possible when user clicks exit on answer selection form. Synergy will behave the same way if it encounters failure during replication of a mapped task from a decision. Please be aware that some processes that must happen as part of selecting an answer may happen before



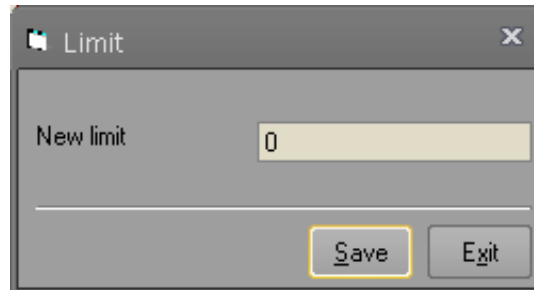
mapped nodes are replicated and hence hitting exit button will have no affect on those parts as they would have been completed first.



- 4) We have added ability to track some user activity such as running queries, reports, exporting data to external files either from Client Group Enquiry or from the displayed reports. To enable this feature, you will need to specify which Synergy users need to be tracked by selecting a security group in the company defaults form.

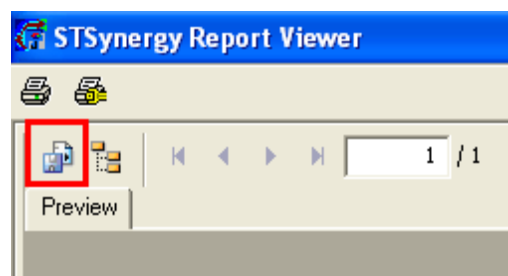


Once the security group is selected, you can then specifying a limit. The limit indicates the number of records that needs to be extracted or viewed before Synergy writes that activity into the database. By default, no one will be tracked unless this security group is set up by the administrators. Obviously, this would be extremely useful to identify those that may have malicious intent of extracting company data without anyone's permission.

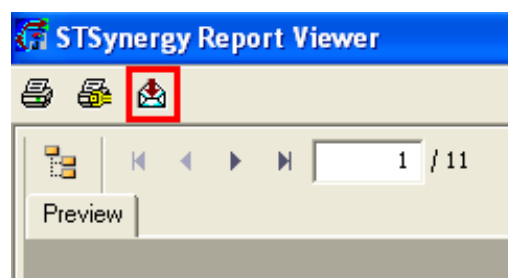


Please note that when this feature is turned on, any printing or data export from displayed report are also tracked. To stop users from closing Synergy application first and then exporting or printing the reports, when the user closes Synergy application while s/he has reports displayed, a warning message will be displayed asking the user to close all the displayed reports first. If the user decides to ignore this warning, then a record will be written to the database specifying how many reports was left open and how many records where displayed in each report.

- 5) We have moved the export button from the Crystal Report toolbar to our own toolbar (the toolbar at the top) in our Crystal report viewer. This change would only be visible if the logged user's activity is being tracked and the number of records that is displayed in the report exceeds the activity tracking limit.

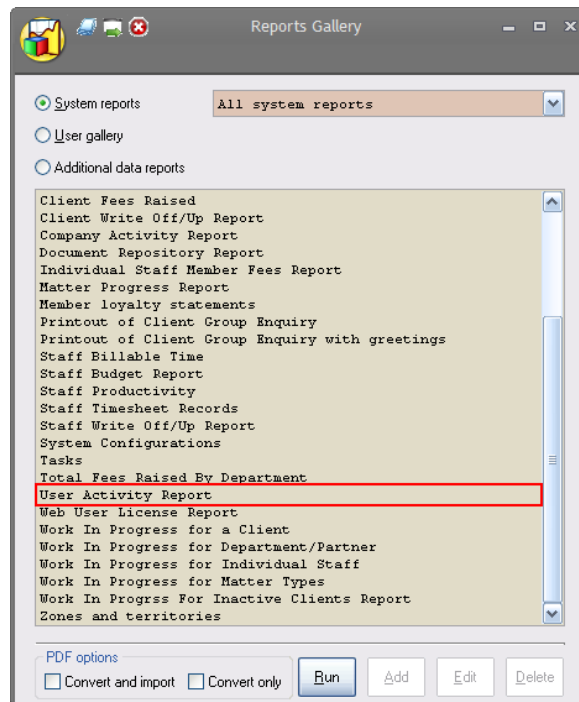


Crystal Report Export Button



Synergy Toolbar Export Button

- 6) We have added a new system report that displays the tracked user activities. Please note that only those users with housekeeping access are allowed to run this report. The report is set for an A3 landscape mode print as the displayed information is just far too much to fit into an A4 size paper.



When you run this report the following form will be displayed.

The start date will default to the beginning of the previous month and the end date will be set to current date. Also all the user activity types will be selected by default. A drop down also allows the administrator to select a specific user or all of them. A check box also allows removing of inactive users from the user drop down. The following information will be displayed in this report.



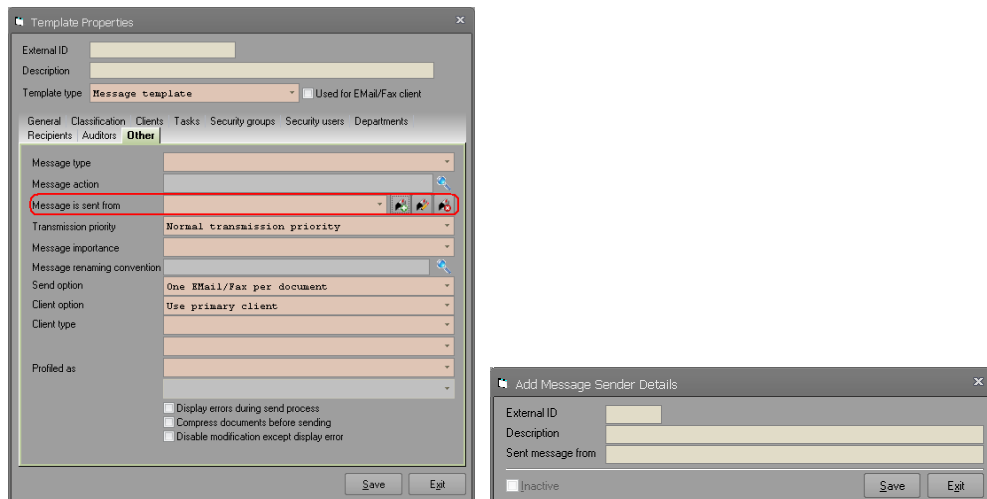
User Activity Report  
Between 22/11/2019 And 01/10/2019  
Printed on: 22/11/2019

User's Name

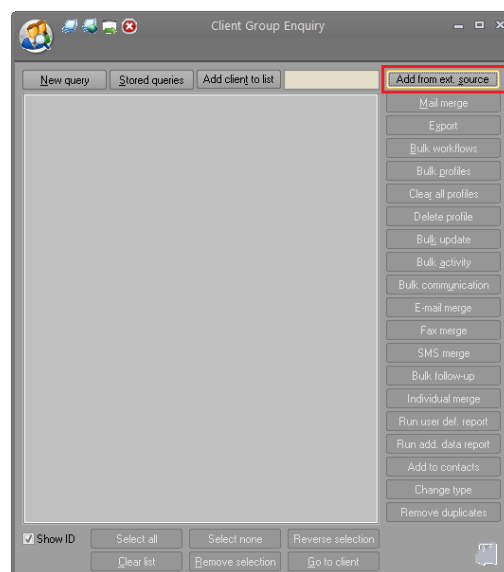
Activity Type Description	Date	Time	Login Identifier	Machine Name	IP Address	Records	Description	Notes
---------------------------	------	------	------------------	--------------	------------	---------	-------------	-------

- 7) Synergy allows administrators to set up a mailbox that will be used in message templates as the send on behalf mailbox for messages. The mailbox's actual email address was stored at the template level. What this meant was that if you changed the mailbox email address and that mailbox was used in multiple

message templates, the administrators had to reset the mailbox address in all those message templates. In this version, we have relationally linked the send on behalf field of the message template to the ZZMSGFRM instead of storing the actual email address. With this change, only the key of the ZZMSGFRM table is stored in message templates rather than the email address. Therefore, updating the email address would be transparent at the message template level. A warning message is also displayed when modifying the message sender details if the modification affects more than one message template.

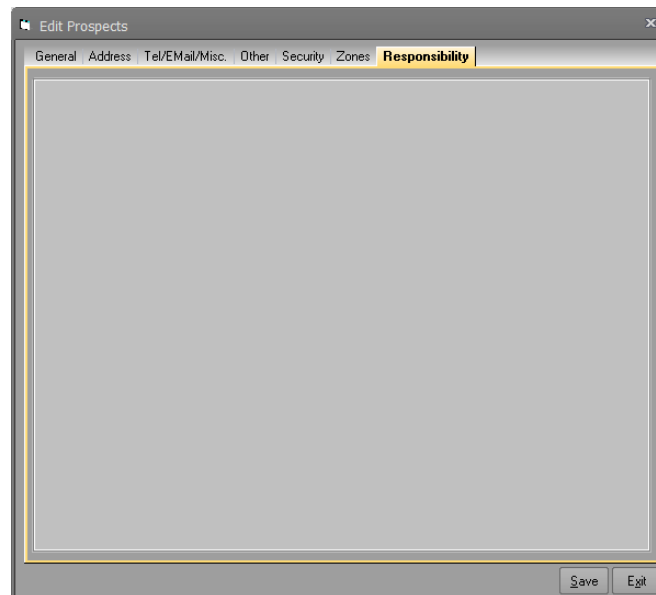


- 8) When importing data from external sources in Client Group Enquiry, it was only checking the client's current account number. So if someone exports a list from Client Group Enquiry and then attempts at importing the same list a few days later, only clients where their current account number has not changed will be imported to the list. This has been fixed by checking account number history.



- 9) We have fixed a few minor bugs in our Software Development Kit. As part of these changes, the some API signatures have been amended. Mainly, some parameters are now passed by reference rather than by value and vice versa.

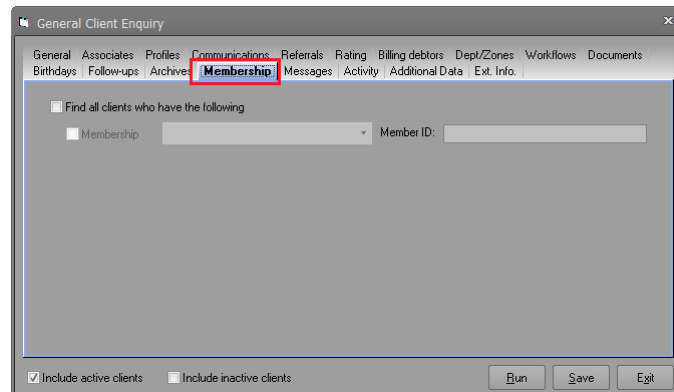
Correcting these signatures is trivial and should not require much effort at all. For instance, Synergy allows multiple users to be responsible for a client, one as primary person responsible for the client and additional users as alternate users responsible for the client when the client deals with multiple departments in an organisation. For these clients, Software Development Kit was not setting the details of the alternate users responsible for the client. Those users could be added through the responsibility tab of the client edit form.



- 10) The main client edit form was displaying a member check box even when loyalty module was turned off. This check box should now be properly made invisible until the loyalty module is turned on.

A screenshot of a software window titled 'Add Customers'. It has a tabbed interface with tabs for 'General', 'Address', 'Tel/Email/Misc.', 'Other', 'Security', 'Zones', and 'Responsibility'. The 'General' tab is selected. The form contains various input fields and checkboxes. At the bottom, there is a checkbox labeled 'Member' which is highlighted with a red rectangle. Other fields include 'Automatic ID' (checked), 'Ref no.', 'Use business name' (checked), 'Library text', 'Client name', 'Business name', 'Contact title', 'Gender', 'Contact source', 'Given name', 'Other names', 'Surname', 'Preferred name', 'Initials', 'Responsibility' (System Administrator (SA)), 'Dept/Partner' (n/a), 'Billing debtor', 'Address source', 'Attention', 'Postal address 1', 'Postal address 2', 'Suburb', 'Postcode', 'State', 'Country', 'Barcode', 'Sort plan', 'Trust billing', and 'Other billing'. 'Save' and 'Exit' buttons are at the bottom right.

We have also made the Membership tab of the General Client Enquiry invisible as part of this amendment as it has no relevance when loyalty module is turned off.



- 11) We introduced ability to group additional data columns into a group and fill all of them by selecting data for group header. There was bug that allowed sites to inactivate the group header which would cause the group header to be removed from the additional data form. In this case, users would be unable to fill the data for the other group members. We have fixed this bug on this release.

 A screenshot of the 'Add' form. The 'Client Account' and 'Client Name' fields are grouped together and highlighted with a red rectangle. Below them are several dropdown menus: 'Customer Segment', 'Industry Segment', 'Model Required', 'Competitor Brand', 'Competitor Machine Type', and 'Competitor Model'. There is also a 'Configuration' dropdown and a 'Competitor Price' input field with the value '0'. At the bottom, it says 'Items in bold are mandatory' and has 'Save' and 'Exit' buttons.

Additional Data columns with group header active

 A screenshot of the 'Add' form. The 'Client Name' field is highlighted with a red rectangle. The 'Client Account' field is no longer visible, indicating it has been removed from the form. The other fields ('Customer Segment', 'Industry Segment', 'Model Required', 'Competitor Brand', 'Competitor Machine Type', 'Competitor Model', 'Configuration', 'Competitor Price' with value '0', and 'Competitor Qty Purchased' with value '1') remain. At the bottom, it says 'Items in bold are mandatory' and has 'Save' and 'Exit' buttons.

Additional Data columns with group header inactive

- 12) We have made the save button invisible on the enquiry form for those that are not part of the stored query maintenance security group. This will stop people outside the security group from saving their queries.

The screenshot shows the 'General Client Enquiry' window with the 'General' tab selected. The window has a menu bar with options: Birthdays, Follow-ups, Archives, Messages, Activity, Additional Data, Ext. Info., Associates, Profiles, Communications, Referrals, Rating, Billing debtors, Dept/Zones, Workflows, and Documents. Below the menu bar, there is a section titled 'Please select the data you need to extract'. This section contains a table with two columns: 'Description' and 'Table and column names'. The table has five rows, each with a checkbox in the 'Description' column. The first four rows have their checkboxes checked, and the fifth row has its checkbox unchecked. To the right of the table, there are three buttons: 'Move up', 'Move down', and 'Seln. to top'. Below the table, there is a checkbox labeled 'Restrict the enquiry to the following client range'. Below this checkbox, there are two text input fields: 'Find all clients with' and 'That match the condition'. At the bottom of the window, there are two checkboxes: 'Include active clients' (checked) and 'Include inactive clients' (unchecked). To the right of these checkboxes are three buttons: 'Run', 'Save' (highlighted with a red box), and 'Exit'.

Description	Table and column names
<input checked="" type="checkbox"/> ZZCLIENT.AccountNo	Account number
<input checked="" type="checkbox"/> ZZCLIENT.Address3	Postal address suburb
<input checked="" type="checkbox"/> ZZCLIENT.State	Postal address State
<input checked="" type="checkbox"/> ZZCLIENT.InChargID	Identifier of the person responsible for client
<input type="checkbox"/> ZZCLIENT.UniqueID	Client's unique identifier
<input type="checkbox"/> ZZCLIENT.ABN	Australian Business Number

Enquiry from when user has security clearance

The screenshot shows the 'General Client Enquiry' window with the 'General' tab selected. The window has a menu bar with options: Birthdays, Follow-ups, Archives, Messages, Activity, Additional Data, Ext. Info., Associates, Profiles, Communications, Referrals, Rating, Billing debtors, Dept/Zones, Workflows, and Documents. Below the menu bar, there is a section titled 'Please select the data you need to extract'. This section contains a table with two columns: 'Description' and 'Table and column names'. The table has five rows, each with a checkbox in the 'Description' column. The first four rows have their checkboxes checked, and the fifth row has its checkbox unchecked. To the right of the table, there are three buttons: 'Move up', 'Move down', and 'Seln. to top'. Below the table, there is a checkbox labeled 'Restrict the enquiry to the following client range'. Below this checkbox, there are two text input fields: 'Find all clients with' and 'That match the condition'. At the bottom of the window, there are two checkboxes: 'Include active clients' (checked) and 'Include inactive clients' (unchecked). To the right of these checkboxes are two buttons: 'Run' and 'Exit'. The 'Save' button is not visible.

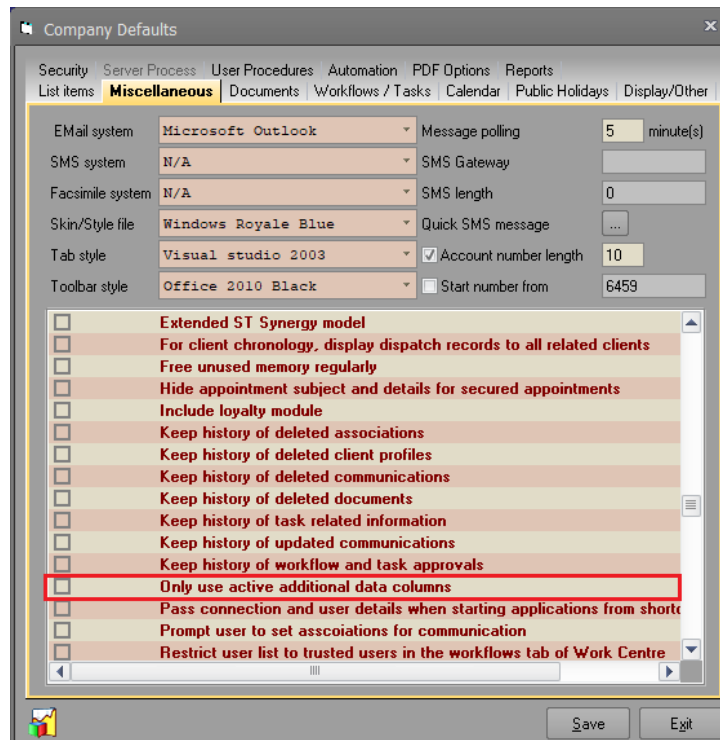
Description	Table and column names
<input checked="" type="checkbox"/> ZZCLIENT.AccountNo	Account number
<input checked="" type="checkbox"/> ZZCLIENT.Address3	Postal address suburb
<input checked="" type="checkbox"/> ZZCLIENT.State	Postal address State
<input checked="" type="checkbox"/> ZZCLIENT.InChargID	Identifier of the person responsible for client
<input type="checkbox"/> ZZCLIENT.UniqueID	Client's unique identifier
<input type="checkbox"/> ZZCLIENT.ABN	Australian Business Number

Enquiry from when user does not have security clearance

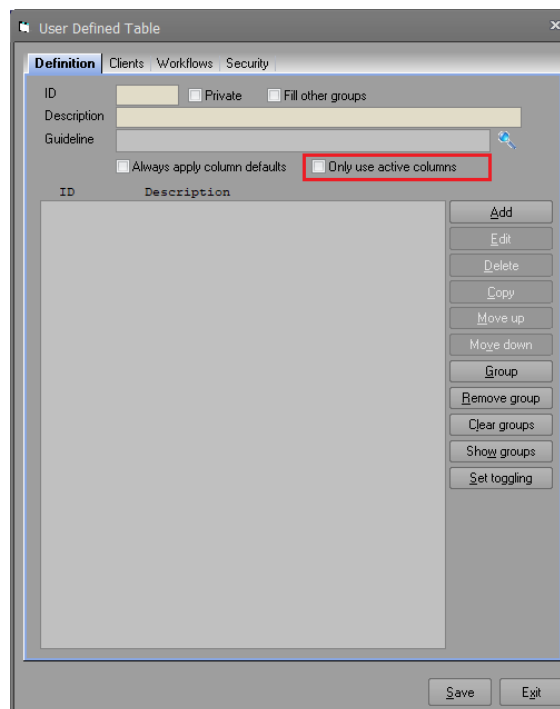
- 13) When inactivating additional data columns, the inactive columns will not be displayed when adding new rows. However, when editing an existing additional data rows, the inactive columns will be displayed so that the user can see/alter any required data.

Some clients have asked us to provide means of hiding all inactive additional data columns from the user interface. We have added two options for this purpose. The first option is a house keeper setting that allows this to be done for all additional data tables. Turning this on will hide all inactive columns

from user interface. To preserve existing behaviour, this setting will be turned off by default for this version.



We have also allowed finer configuration at each additional data table level. If you want to configure this at each additional data table level, turn the global company wide setting off and then turn on/off the following option at each additional data table level based on your requirements.

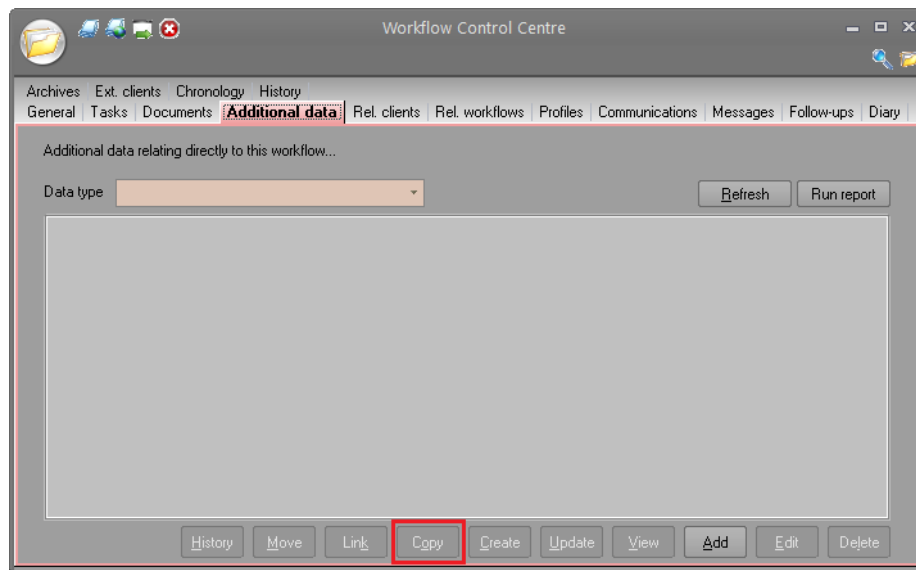




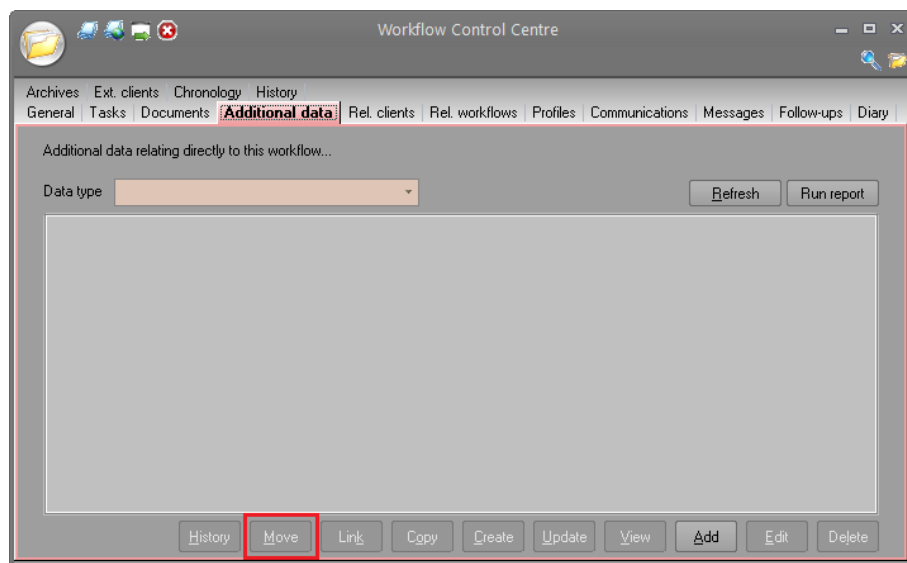
Once the configuration is set, the inactive columns will not be displayed in lists, add, or edit forms or any other additional data processing.

Please note that these settings will be considered everywhere in the Synergy application including the functionality provided in the **Support Tab** of the housekeeping for our own consultants.

- 14) There were two bugs in moving and copying additional data. The copy was failing in some instances because the value in the additional data column was not matching the list items. This was due to trailing spaces. In this version, the comparison is done by removing leading and trailing spaces.



Synergy was also leaving the list entry when moving it to another client or matter. This would only happen if you do not tick any items from the list. In this instance it would move the highlighted item but in moving this item, it was not using the correct list index for removal. This bug has also been fixed.



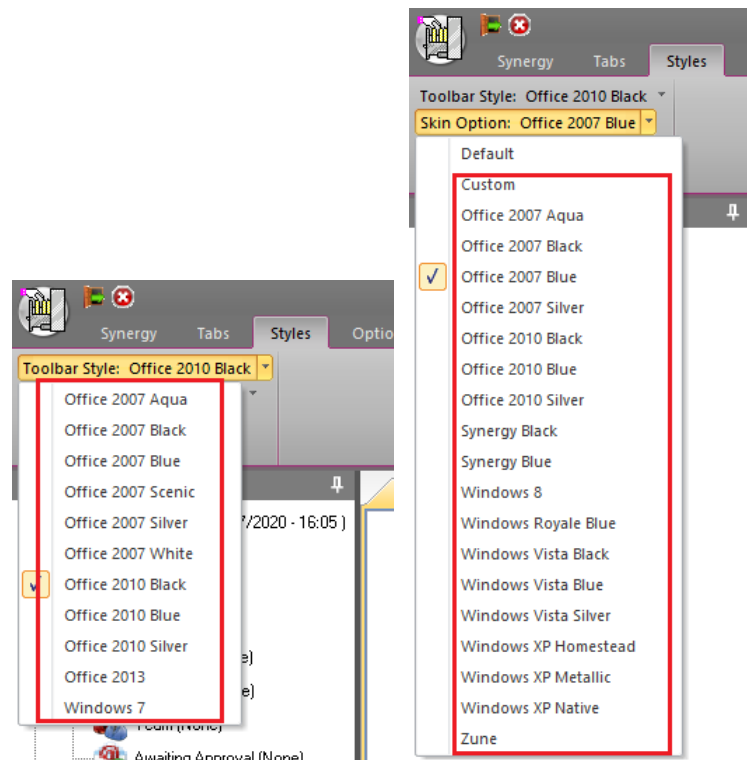
- 15) We have changed the way profile category drop down gets populated in matter search form. In previous versions, it was simply displaying all the profile categories that were linked to matters. This meant that when you select a specific matter type, the profiles were not filtering to display only the profile categories that were linked to that particular matter type. This was confusing some of clients especially those that have been using the matter profiling heavily. In this version, when a matter type is selected, the profile categories will be filtered and only those profile categories relevant to the selected matter type will be displayed. When no matter type is selected, all profile categories will be displayed.

The screenshot shows the 'Workflow Search' window with the 'General search criteria' tab selected. The 'Profiles' dropdown menu is highlighted with a red box and displays '(All profiles)'. Other search criteria include Workflow no., Reference no., Created by, Description, Received from, Completed from, Target from, Related client, Primary client, Workflow type, Approval by, Profile subcategories, Importance, and checkboxes for Masters only, Non masters only, Active, Inactive, Include completed workflow, and Exclude future workflows. A 'Begin' button is highlighted in yellow.

- 16) When exporting additional data from housekeeping form, Synergy was not providing any feedback as to how the process was progressing. On sites with large amount of data, the user could not have a feeling of when the export may finish. We have added feedback by means of displaying progress via progress bar in the status bar area. The process was also failing when additional data table or column descriptions contained dot character. We have also fixed this bug on this version.

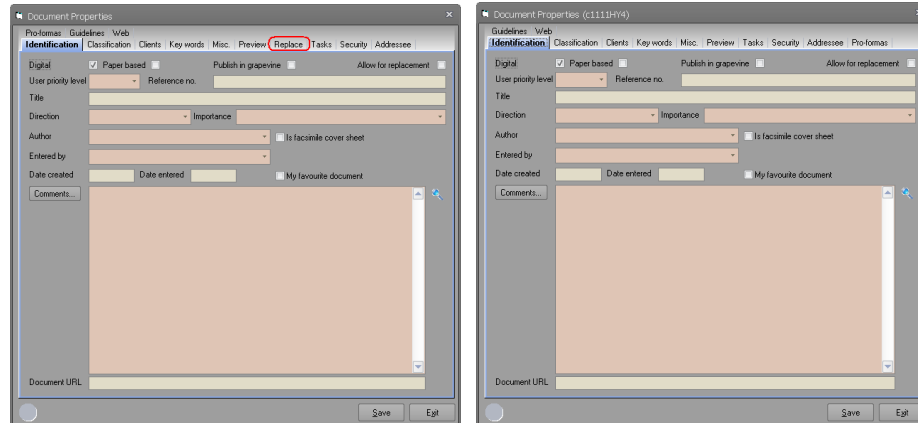
The screenshot shows the 'Maintain Company Configuration' window with the 'Additional data' tab selected. The 'Export additional data' button is highlighted with a red box. The window includes a menu bar with options like Clients, Filing/Profiles, Archives, Documents, Security, Workflows, Associates, Tools, Messages/Communications, Follow-ups, Company, Membership, Additional data, Library, Support, Calendar, Timesheet/Time cost, and Countries. The main area contains a section for defining items to capture additional information and a progress bar.

17) We have sorted the skin and toolbar drop downs alphabetically.

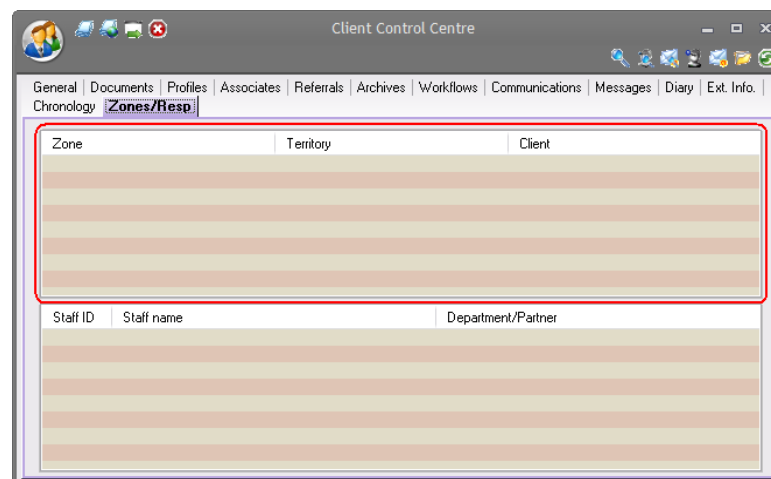


**Modification as at release 11.01.03**

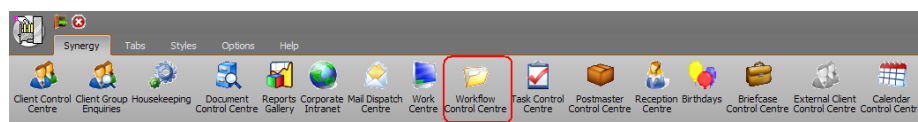
- 1) When opening document properties form for a non-master document, it was displaying the replacement symbol tab. We have fixed this bug since replacement symbols are only applicable to master documents.



- 2) When there were multiple people responsible for a sales territory, clicking on the Zones tab in the CCC generating an error. We have now fixed this and display all the people responsible for the sales territory in the list.



- 3) In some cases, the MCC icon was not being displayed on the Synergy toolbar. This was due to a bug where Synergy was checking the Intranet setting before displaying this icon. This bug is fixed.



- 4) When external applications were attempting to load MCC or CCC, Synergy was setting the focus to itself before loading the appropriate form. This was generating an error when Synergy window was minimised. We have fixed this bug by restating Synergy window to maximised position before focusing on window when application is in minimised position.

- 5) In previous versions, we added a feature to allow document creation when creating new matters. Some customers have asked us to extend this to task approval. We have now extended the document creation for task approval as well. In this version, when approving a task, Synergy will look at all the created sub-tasks and create a document from any pro-forma that is marked with auto-create flag. This would hopefully allow for a more efficient and seamless workflow processing.
- 6) We have fixed a bug in the favourite queries. When the queries run from Work Centre, if the query includes the user as parameter, it was not hard coding the logged user for the parameter as it is done when queries are attached to a report. This is fixed in this version.
- 7) In some cases, sites may have additional data that allows searching for a client and storing data from the client in additional data. In this case, they may want to store some of the client's profiles in additional data as well. Given that the client profile and client information are defined as two different data selection types, Synergy will not allow these additional data fields to be grouped together and hence the user has to make a second selection for the client profile.

In this version, we have allowed the additional data form to select the client profile, if the client profile is located directly below any of the fields within the client group. To do this, you need to check the **Fill other groups** check box in the additional data table.

With this change, when you select a client, all the information for the client will be filled and if you place a client profile entry directly below any of the client fields, then Synergy will select the required client profile and display it in the additional data field. If you have multiple client profile fields one after the other one, as long as the first client profile field is directly below one of the client fields, they all will be processed.

The screenshot shows a window titled "Add Sales" with a grey background. On the left, there is a list of fields: "Client Account", "Client Name", "Customer Segment", "Industry Segment", "Model Required", "Brand", "Machine Type", "Model", "Configuration", and "Price". The first four fields are grouped under the heading "Client Group" in red text. The next two fields, "Customer Segment" and "Industry Segment", are grouped under the heading "Client Profiles" in red text. The remaining fields are individual. A red rectangle highlights the "Client Group" and "Client Profiles" sections. At the bottom left, a note says "Items in bold are mandatory". At the bottom right, there are "Save" and "Exit" buttons.

Synergy will only fill the client profiles if they are placed directly under a client group member. In the above image, if you put any other field between the client name and the two profiles, the profiles will be ignored. This change also implemented for matter related groups. In case of matter information, if the profile is defined as client profile, then Synergy will attempt at finding the relevant profile from the primary client of the matter. If the profile is defined as matter profile, will attempt at finding the relevant profile from the selected matter.

We have also changed our Software Development Kit functionality to cater for this feature. When “**ApplySelectedReplacementEntityToColumnGroup**” is called, the Software Development Kit will apply the same rule. However, display of the new data on the user interface is left to the developer since Software Development Kit has no connection to UI elements. To do this, developers can use **ReplacementEntityIdentifier** and **Value** properties from the additional data column to display the appropriate value or select the correct entry from a dropdown list should the data be displayed in a dropdown list. To assist developers, we have added a new method to the additional data row class called **ShouldColumnBeFilledAsPartOfGroup**. You need to pass the index of the group header column and the index of the column that you want to check and the library will tell you whether the column was changed by the group header column. When this method returns true, you will need to display the new value on your user interface. The indices should be the indices of the columns in the additional data row class. Please look at our test application to determine how to achieve these using the newly added methods.

Please note that Synergy will only look for active profiles and, in case of multiple profiles, will sort them based on the client/matter profile table primary key. This method of sorting will allow selection of the last added

profile. Client type profiles will be processed for other groups that result in a client or matter being selected.

The data selection types relevant for client profiles are:

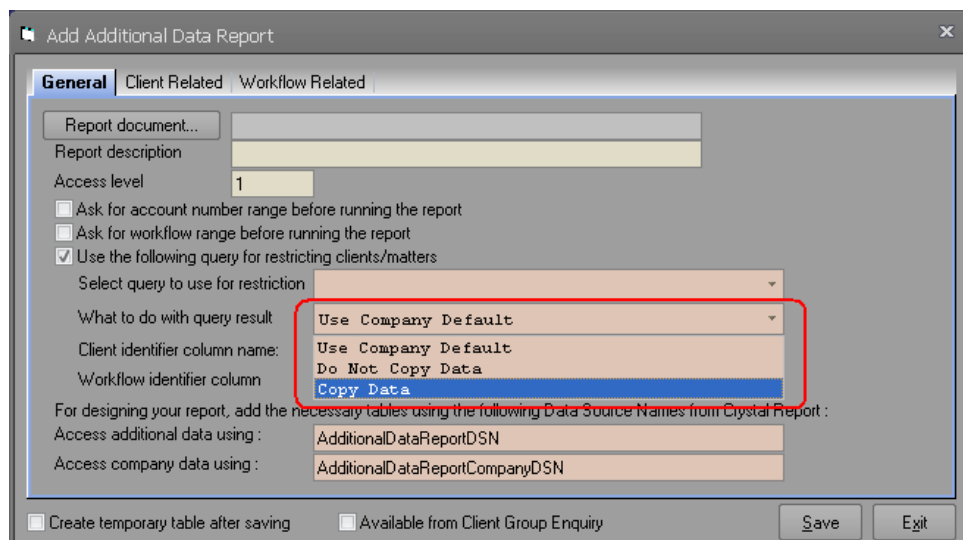
**Client, Client association, Indirect association, Matter related client, Matter, and Related matter**

The data selection types relevant for matter profiles are:

**Matter, and Related matter**

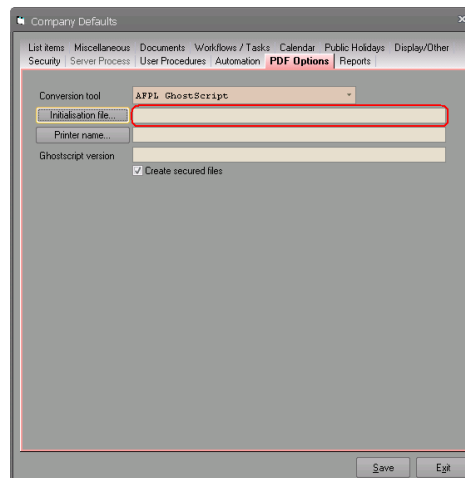
Please also note any new selection types added to Synergy will be considered for their inclusion in this process in the future.

- 8) When running user defined reports, Synergy creates RRESULT.DBF as the data source for the user defined report. This would be OK if a user runs only one user defined report at a time. However, if a user runs a report and leaves the report open and runs another user defined report, the RRESULT.DBF will be overwritten by Synergy. In this instance, if the user tries to refresh the first report, Crystal Report will generate error as the data source for the first report has been replaced with a different data source. We have fixed this by appending a number to the RRESULT file name. Please note that this fix is only for the user defined report. If you are using a stored query for additional data reports, please make sure that you select the copy option for the query result. That way, there will be no conflict as the data is copied into the additional data access database.



- 9) Due to creation of new database file for every user defined report, we have amended our report viewer to delete these newly generated database files when user closes an open report. The base FoxPro database files like RRESULT.DBF, ARESULT.DBF, ERESULT.DBF will still be left intact will be deleted when Synergy application closes.
- 10) Fixed a bug in the PDF Options tab of the company defaults form. When the initialisation file entry was left blank, administrators were unable to select a

new file. This was due to use of an incorrect filter for the open file dialog. This bug is fixed on this version.





***Modification as at release 11.01.02b***

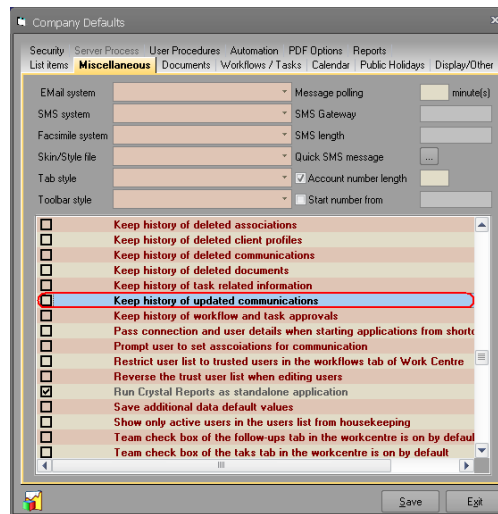
- 1) Synergy introduced ability to keep history of communication changes. When we introduced this, our Software Development Kit was not handling the communication history record creation correctly and as a result failing to create or update the communication. This bug is fixed on this release. Please note that this bug will only affect those sites that have turned on the keep history of communication changes flag in the company defaults.

***Modification as at release 11.01.02a***

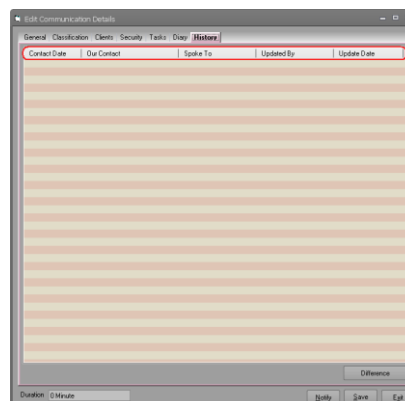
- 1) When opening a finalised document, Synergy would not allow user to save the document. However, a user could click on Save As and save the document with a new name on some other folder. We noticed Microsoft Word 2016 and later versions behaved differently when users were clicking Save As button. We have fixed this issues by amended our word template SynWord8.dot to over come this difference in behaviour.
- 2) When selecting folders, for example for copying documents to briefcase, Synergy is forcing user to select a file. This issue is fixed on this release.

## *Modification as at release 11.01.02*

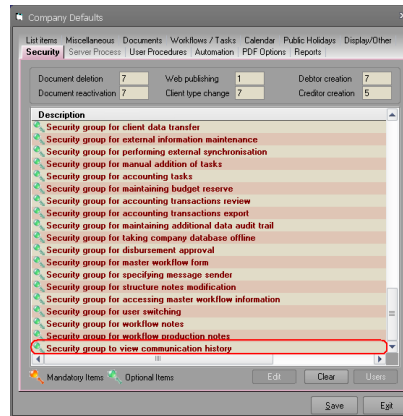
- 1) We have added ability to track changes to communications. This can be achieved by turning on the following setting from the housekeeping:



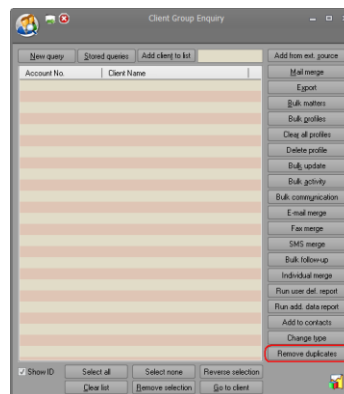
When this setting is turned on, a new History tab will be displayed on the communication edit form. This tab will display some information about the communication like the date, start time, who the user spoke to, who was set as our contact, the person that changed the data, and the date and time when the change happened. Clicking the difference button will display the changes between the current communication data in the database (not what has been entered on the user interface) and the selected history record. If the history record is identical to the current communication data in the database, a user will be informed via a message box. This can happen in two instances. The first case is when the user selects the last record in the list. The second case is when the current communication data has been restored to the values that they were when a history record was created. In these two cases, no difference will be displayed. Please note that if the only change to communication data is the reference, no history record will be created. Changes on any other information of general tab as well as anything else like classifications, clients, tasks, security groups or users will result in creation of a history record. Please use this function wisely and only if it is absolutely needed as it may create huge amount of historical data.



By default, this tab is visible to everyone when the setting is turned on. Should administrators decide to limit visibility of this tab to say managers rather than all users, we have added a new security group that will achieve this in the housekeeping.



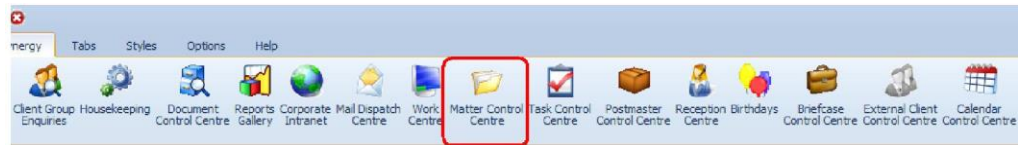
- 2) In Client Group Enquiry, the Remove Duplicates button initially was intended to allow users to remove duplicates for changing client types. So if a user were not allowed to change the client type, Synergy was disabling this button as well. Some of our clients have started to use this button for other purposes and have asked us if this button could be made available for everything. We have made this button available on this version by default.



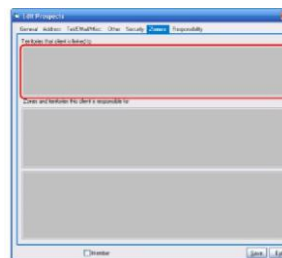
- 3) As you are aware, we are gradually moving functionality into our .NET and c# library. In this version, we have moved the selection of files, folders, and colour into our .NET library. We are now, using the file explorer and colour picker forms from .NET platform when a user attempts at picking a colour or select/save a file or pick a folder. Please ensure that you have tested your processes that involve these changes thoroughly as the underlying platform for them has changed. As we have stated numerous times in the past, .NET V4.5.1 is the minimum version required for Synergy.

### *Modification as at release 11.01.01*

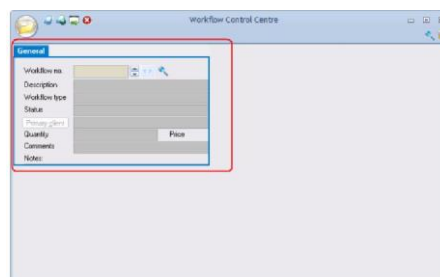
- 1) The ribbon bar icon for the Matter Control Centre was not customising the name based on company setting. This is fixed on this version.



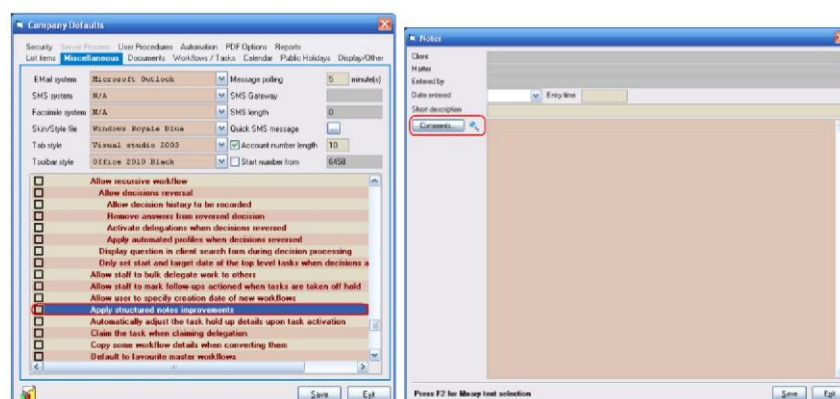
- 2) When adding clients through Software Development Kit, library was not assigning the correct zones and territories. This has been fixed on this version of the Software Development Kit.



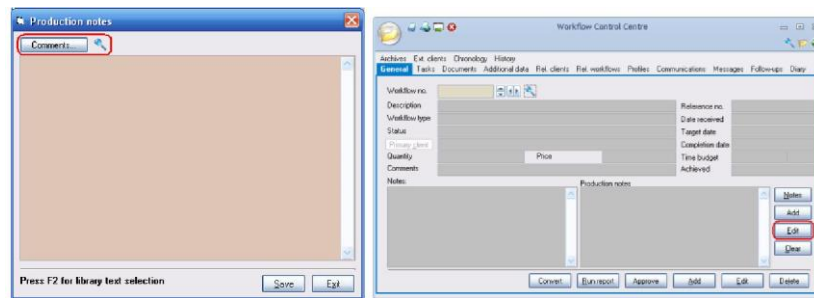
- 3) Resizable control centres were allowing users to reduce the size of the content of the form as small as they wanted too. We have fixed this bug on this version.



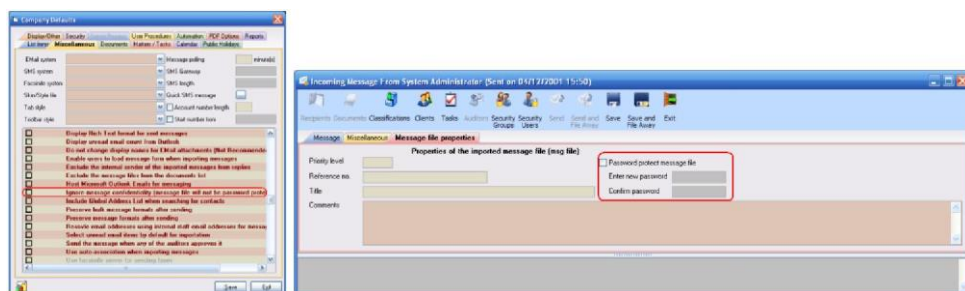
- 4) Added two new buttons to the structure note maintenance form that allows users to use library text easily. These buttons will be visible when structure notes improvement housekeeping option is turned on.



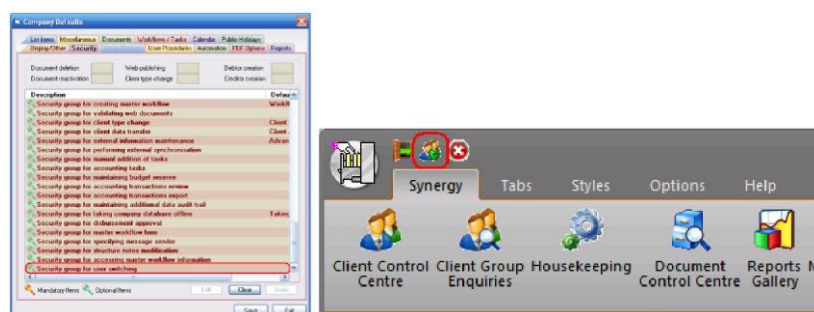
- 5) We have also added library text buttons when editing production notes from Matter Control Centre.



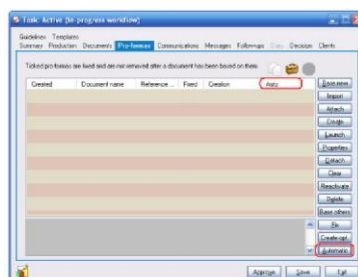
- 6) When a private email is imported, Synergy will protect the message file document using the encrypted password of the user that is importing the message. Consequently, any user that will attempt at opening these message files will require entering the password of the user that imported the message. Our clients have requested to have the ability to by-pass the message file password protection mechanism in Synergy. We have added a new housekeeper setting that allows site to have an unprotected message file even for private and confidential messages. In the future versions, a similar option may be provided at the user level where administrators can be selective and specify users where such facility is needed rather than everyone.



- 7) When sites are using single logon option to log into Synergy, an icon allows the user to switch and logon as a different user. We have been asked to restrict users and do not allow them to logon as a different user. To accommodate this, we have added a security group that allows administrators to selectively specify who should have access to switch and logon as a different user. By default, user switching is enabled until a security group is specified. From that point onward, only users within that group will be allowed to switch user.

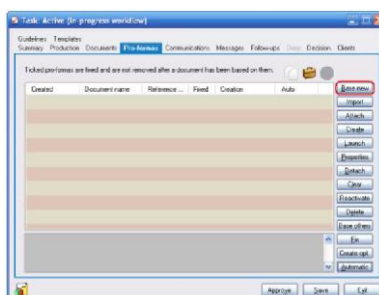


- i. Attach the document that should be created as proforma to a task on the master matter. The task must be a task that will be created as a permanent task during the matter creation. Using silent tasks, that is, tasks that are marked to be ignored as part of decision process, will not work.
- ii. Mark the proforma as an automatic proforma in the proforma tab of the task edit form.



Once this is done, when you create a matter, any proforma that is marked as automatic will be processed as the last step of the matter creation process. The creation of new documents and what happens to proforma record follows the same process as clicking “**Base new**” button on the task edit form. The following steps describe what will happen to the proforma record:

- i. If the proforma record is defined as fixed:
  - Will be marked as fixed.
  - Creation option will be changed to optional.
  - Automatic flag will be turned off.
- ii. If the proforma record is defined as unfixed, the proforma record will be deleted from the task.



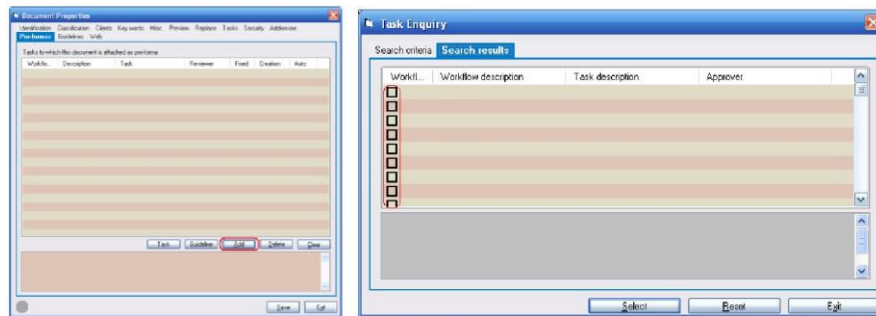
Please note that automatic flag for proforma records is only looked at when matters are created. It would be useless to set this flag on proformas that belong to a task that will not be created as part of matter creation as it will never be considered in any part of the Synergy application thereafter.

Please also remember that if you attach the same document to multiple tasks as automatic proforma, only one production document will be created and linked to all those tasks. However, the proforma records will be processed as individual records according to the above rules, that is, if the same document is marked as fixed for one task and unfixed for another task, the proforma

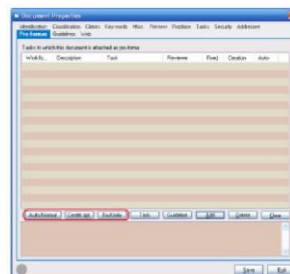
record on the second task will be removed while the proforma record on the first task will remain in the system as optional proforma.

9) We have made some changes to the document properties form to make it more productive. The changes are as follows:

- i. When attaching tasks to proformas tab, administrators could only select a single task. This would make setup tedious if the proforma has to be attached to multiple master matters. We are now allowing multiple tasks to be selected in one operation.



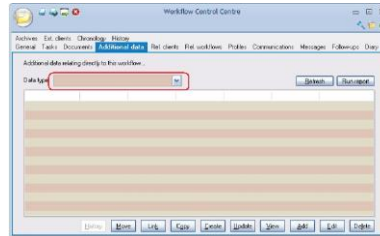
- ii. When attaching tasks to proformas tab, there was no way of setting the proforma properties such as fixed/unfixed, creation option and automatic flag. Administrators had to use the task edit form to set these flags. We have added 3 new buttons to allow administrators to set the proformas properties from the proforma tab of the document properties form. Please note that these buttons will only be available on proforma tab of master documents.



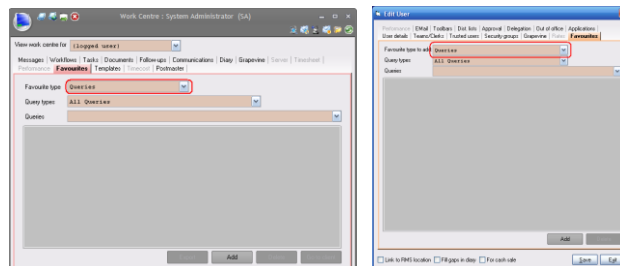
- 10) As you are aware, our SDK currently does not include document creation feature. Consequently, automatic flag on proformas will not be considered by our SDK.
- 11) When creating or editing additional data through Software Development Kit, it was not saving the default values even if the setting was enforcing it. This bug is fixed on this version.
- 12) Our Software Development Kit was limiting the number of characters that could be stored in matter notes and matter production notes. This was related to the VB6 language limitation. We have deployed a solution to work around this limitation but this may not be a stable solution as it will be highly dependent on how external applications are structure and how they interact with Software Development Kit. Please note that the number of characters is limited to 64K as our user interface displays memo fields in a text box which has a limit of 64K characters.



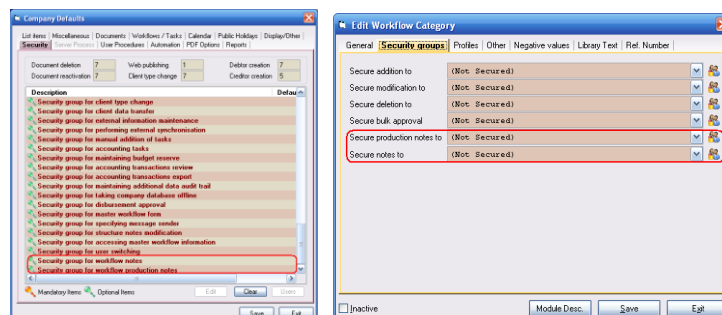
- 13) Additional data lists were occasionally not sorting the list correctly. This was only happening in certain cases when the user was changing the additional data type from the drop down. The problem was caching the column data type when they are displayed. Application was not resetting the data type to reflect the new data type that was being displayed in a column. We have fixed this issue on this version.



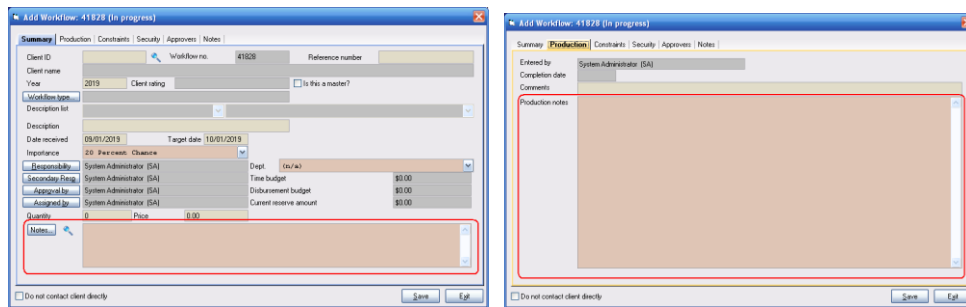
- 14) We have allowed queries to be added to favourites. For sites that have secured access to their queries from housekeeping, users that do not have access to queries will have to create new queries when adding them to their favourites. Users with access to queries will be able to select from existing queries. System administrators can set favourite queries for any user. If queries are secured, SA is the only person that can attach existing queries to user outside the security group. Once a query is run, users can only export the result.



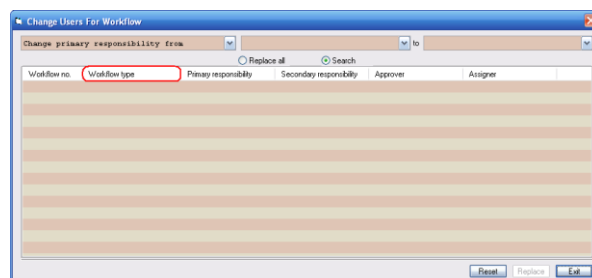
- 15) In order to assist our client to enforce use of structured notes, we have provided two security groups for protecting the matter notes and matter production notes. From this version, when these security groups are set, only users within this security group will be able to modify these notes. Everyone else will have to use structured notes should they want to add a note for a matter. Similar security groups have been added to matter types allowing finer control. Please note that the security group on matter types takes precedence over the housekeeping security groups.



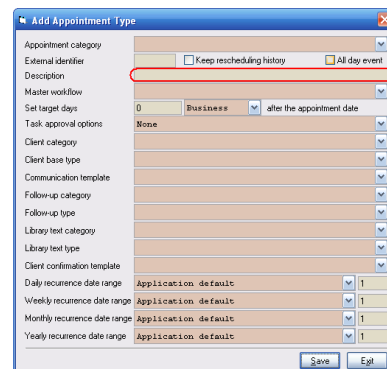
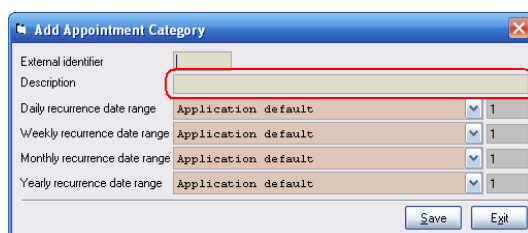
- 16) With the above changes, the following fields in the matter edit form will now be protected based on the above security group rules.



- 17) We have added the matter type to the change approver form to assist our clients in sorting the list and transfer matters based on matter types.

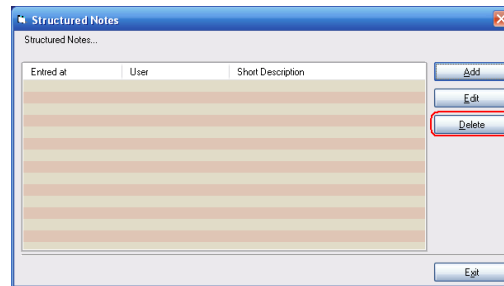


- 18) We have increased the length of appointment category and type description from 25 characters to 60 characters. Synergy was enforcing a unique description for calendar type descriptions. We have relaxed this rule and have enforced uniqueness of descriptions

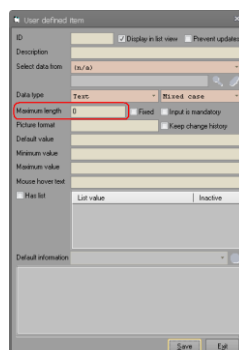


- 19) Our SDK was not returning the correct communication direction. This is fixed on this version.
- 20) Our SDK test application has changed. Creation of log files is now completely controlled before logging in. Thereafter, there is no facility to create log files.
- 21) When creating additional data based on client, Synergy and SDK was ignoring the view security group attached to the client type and returning some information that should not have (e.g. Email, business name, billing debtor, contact name, ABN, CAN, TFN, date of birth, incorporation date, occupation,, preferred name, reference, fax number). This is fixed on this version and such information is only returned if the user is part of the view security group.

- 22) We have added ability to base additional data on client notes and internal notes. Please note that this information follows the usual view security group for client type.
- 23) Deletion of structured notes was only allowing the creators of the note to delete it even if the person was in the structured notes deletion security group. We have changed it so that people in the structured notes deletion security group can delete them regardless of whether they are the creator or not. When there are no security group, then Synergy will only allow the creator of the structured notes to delete it.



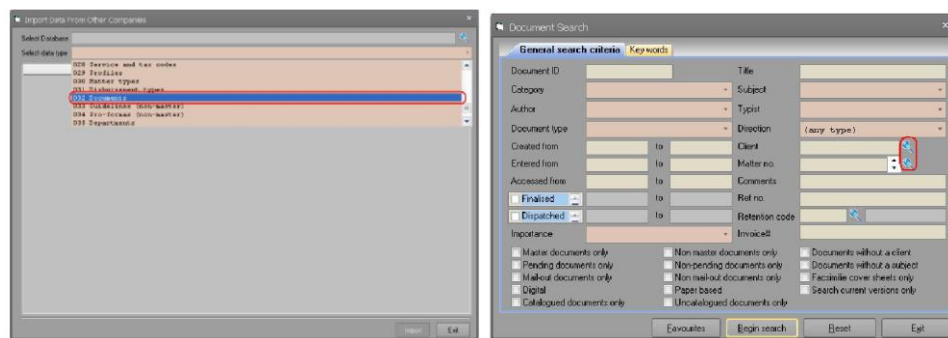
- 24) Our Software Development Kit was allowing the details of a team to be passed as user. As you are well aware, only individual users are allowed to login to Synergy or any of our other products. We have disabled this on this version of Software Development Kit.
- 25) We have added support for Microsoft Office 2019 in this version.
- 26) We have added support for Microsoft SQL Server 2019 in this version. Please note that Microsoft has not fully released this version of SQL Sever and it is still in Community Technology Preview mode.
- 27) We have slightly changed the order of text that appears in production notes of Matter Control Centre. In previous version, production note of the matter was being displayed at the top before the structured notes. We have reversed this now and are displaying structured notes before the matter production notes.
- 28) We have fixed a bug in additional data column form. When administrators were increasing the length of additional data fields, Synergy was not updating the length of any document replacement symbols that was based on that additional data field. This bug is fixed on this version.



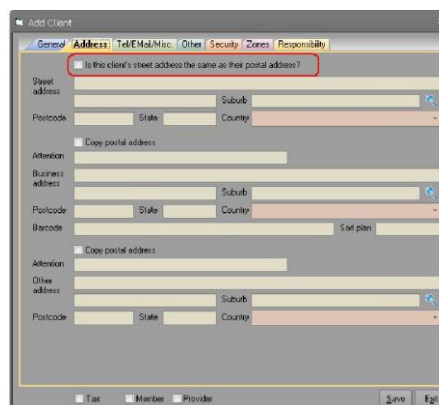
**Modification as at release 11.01.00a**

- 1) Some customers reported a flickering issue with maximised work centre in the Synergy user interface. We have fixed this issue on this release.
- 2) We have fixed a bug in our own importation tool on support tab of housekeeping. When importing documents, the document search, client search and matter search form were not using the correct database for searches. This has been fixed on this release.

**Please note that features in support tab are strictly for use by ST Synergy Staff and is not for use by clients. Do not use any of the features in the support tab even in the unlikely event that you have miraculously worked out the support password.**

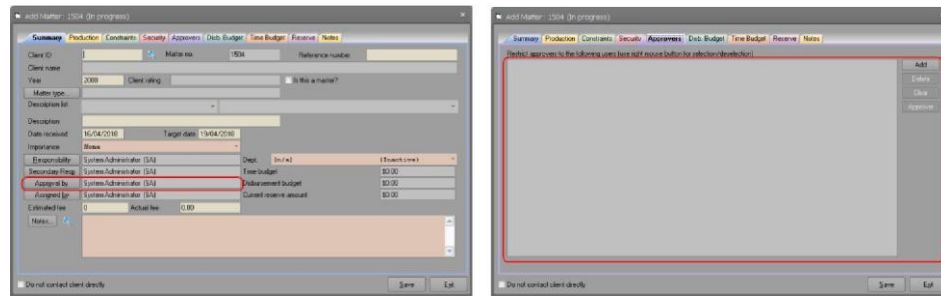


- 3) Synergy allows users to set the residential address to be the same as postal address if the base client type is not a project type client. However, some of our clients have advised us that this was not possible through our Software Development Kit for base client types of company. We have fixed this bug on this release of the library.

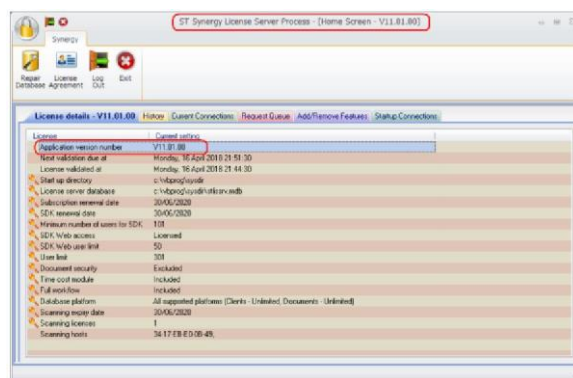


- 4) We have fixed a bug in our Software Development Kit related to matter creation. When a master matter contains a list of approvers, changing the approver of the matter was not replacing the old approver with the newly selected approver in the approver list. This bug is now fixed. We have also amended the **SetWorkflowItemApprover** so that a change of matter approver will automatically change the old approver with the new one in the approver list if there is a list. Failing to do this will cause errors displayed when such

matters are displayed in Synergy user interface and users will be forced to add the approver to the list before saving the changes.

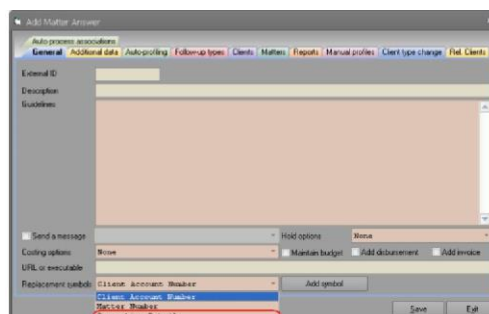


- 5) We have added the version number to the License Server application. We have also maximised the tab control that is displayed in the application.

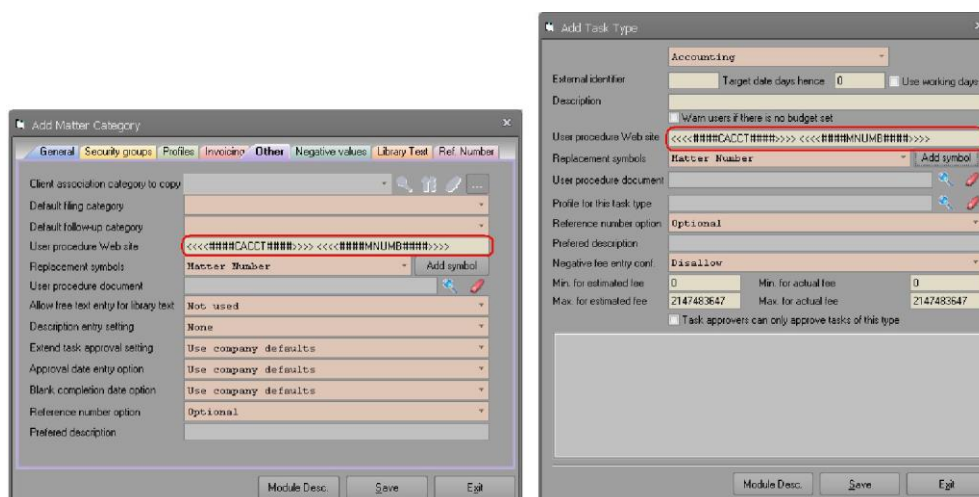


- 6) Synergy allows matter decisions to perform custom actions by storing either a URL or an executable path for every answer. Some of our customers have requested to have the ability to pass the connection and logged user details when an external application is being invoked. To add this feature, we have added an extra symbol to the answer form to allow connection and logged user details to be passed if and when needed. If this symbol is added to the answer configuration, it will be replaced with 9 parameters providing connection and logged user information details to the invoked application or URL. Our Software Development Kit library has also been amended to include this feature. These parameters will appear in the following order:

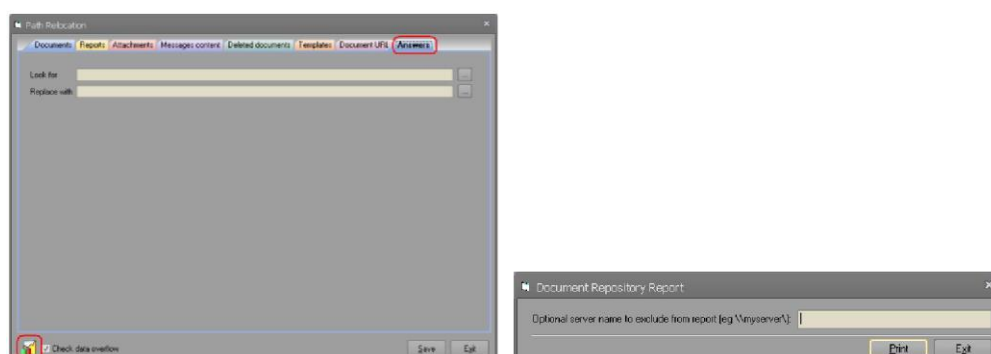
System directory, Company name, Logged user external identifier, Logged user password, Database type, Database name, Database connection user name, Database connection password, Database server name.



- 7) We have fixed a bug related to invoking user procedure web sites from Synergy. If user procedure information was configured to have both a client account number and matter number, providing only one of these was not removing the other symbol from the web site URL. Synergy application is now amended to remove any symbol where the corresponding value is not provided.



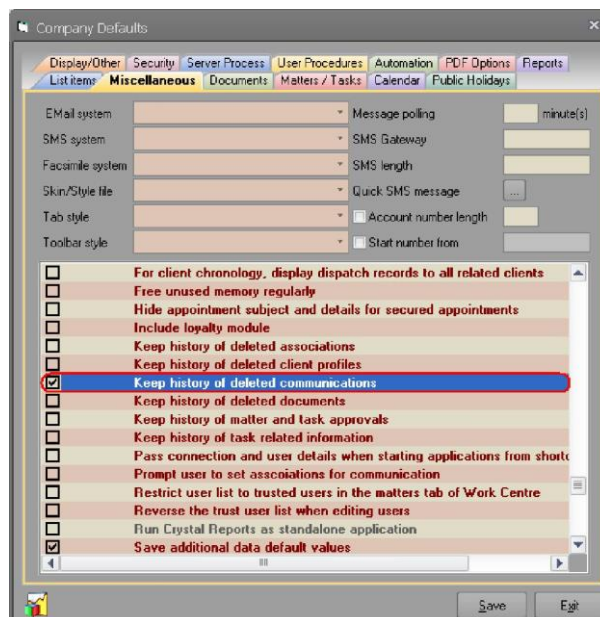
- 8) As stated above, Synergy allows URL or executable paths to be stored against answers. This allows each site to perform custom actions (navigating to a URL or executing a program to update external/internal data) when a specific answer is selected. The document path relocation form did not have any facility to change these paths when required and hence administrators were force to inspect each answer to see whether changes were required when the server path/name is changed. In this version we have added a new tab that allows administrators to replace these paths easily if and when needed. The corresponding audit report is also amended to include the answer details. Please note that any string starting with “**http:**” or “**https:**” or “**www.**” is considered as a URL and will be left untouched.



- 9) Some clients have been using our Software Development Kit to import additional data from other sources into Synergy. They have informed us that their importation is failing due to the fact that their additional data contains mandatory fields that are not available when they are importing data from other sources. To import this data, they had to change the mandatory additional data columns to optional, import the data and turn the column

attribute back to mandatory. We have added a new method to our Software Development Kit called “**ImportAdditionalDataTable**”. This method is identical to “**CreateAdditionalDataTable**” with one difference; Software Development Kit library will ignore the mandatory attribute when the former method is called. We have also added a similar method to our client class.

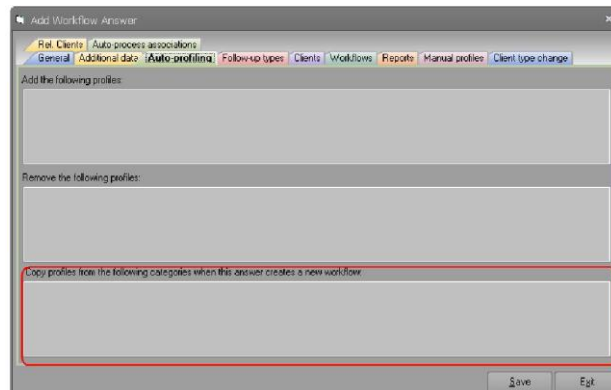
- 10) Synergy has a housekeeper setting for keeping the history of all deleted communications. However, one of our clients informed us that their deleted communication does not appear in the audit trail table. We have fixed this bug on this version and all deleted communications should now be recorded in the history table. Please note that our Software Development Kit was not affected by this bug as it did not include communication deletion feature.





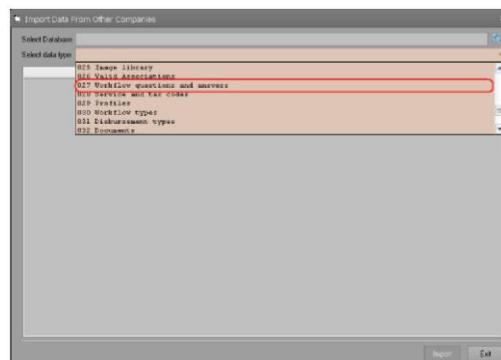
**Modification as at release 11.01.00**

- 1) We have added ability to copy profiles when new matters are created from decision answers. The profile categories can be configured in the answers and will only be looked at during the matter creation process from decisions. Our Software Development Kit has also been amended to cater for this new feature. Please note that only profiles that are allowed to be linked to the new matter will be copied. All those profile categories that are not allowed to be used for the new matter will be ignored.

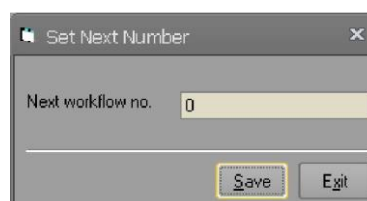


- 2) In light of the above changes, we have enhanced our own importation tool on support tab of housekeeping to allow profile copy configuration.

**Please note that features in support tab are strictly for use by ST Synergy Staff and is not for use by clients. Do not use any of the features in the support tab even in the unlikely event that you have miraculously worked out the support password.**

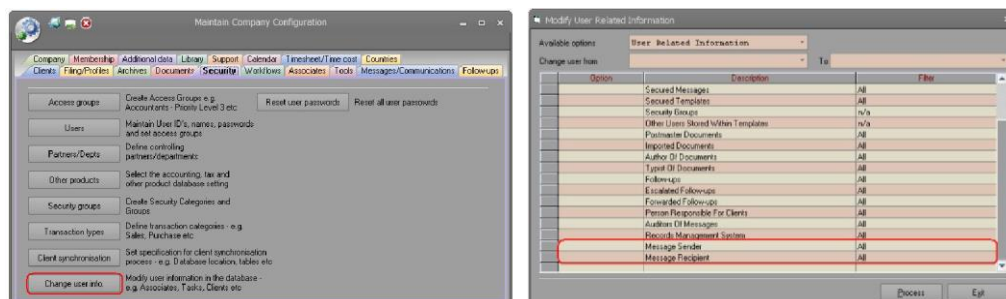


- 3) Fixed a bug in our generic form that allows users to enter numeric values. We noticed this bug when we tried setting a matter number to a specific value from the matters tab of the housekeeping form.



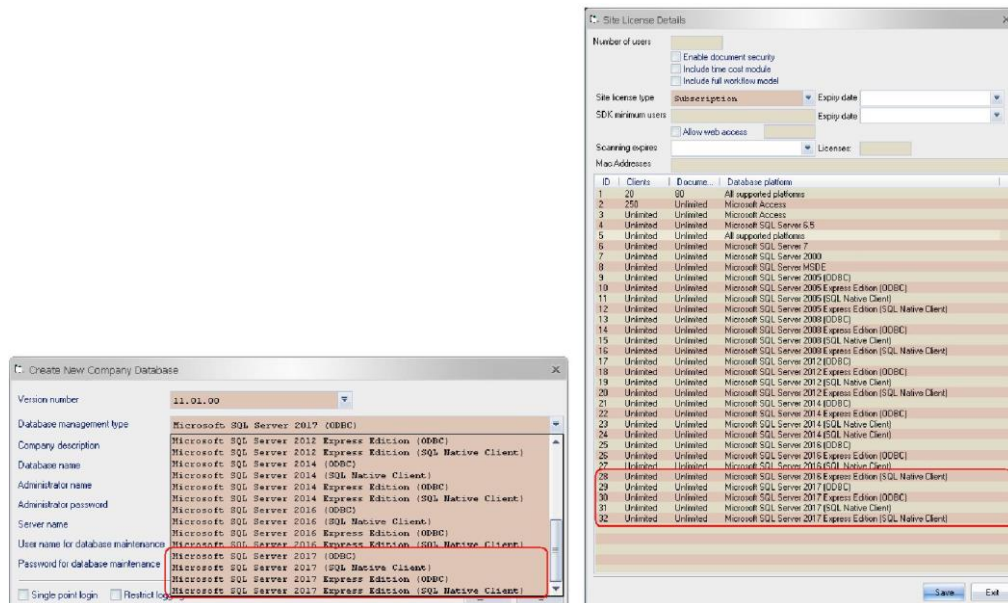


- 4) We have added ability to add security groups and users to the workflow item class in our Software Development Kit. With the addition of these features, developers can now secure the matters created via our Software Development Kit. Please note that this feature is only available on exiting matters. You cannot secure the matters while creating them. We were also notified that users that were not allowed to change matter users (person responsible, secondary responsibility, approver, and assigner) could do so using Software Development Kit. Please note that we have fixed this security related bug in our Software Development Kit.
- 5) As you are aware, we had added our invoicing and time cost module into our Software Development Kit in previous versions. With addition of this module, developers can now create invoices from our Software Development Kit. Please note that in creating invoices, the actual invoice document is most likely to be a Microsoft Word document. Our Software Development Kit library was checking to see if the selected master document was password protected in our database and used to raise the **InvoiceDocumentPassword** event for the developers to trap and provide the password before processing the document. In addition to this password, the actual Word document may also have embedded password protection and for our library to be able to do the replacement and mail merge, it will need to know the password so that the document can be unprotected. In previous version, the library was just displaying a message box which is not the best approach to get data from developers. In this version, we have changed this and now the invoice class is raising an **EmbeddedDocumentPassword** event that developers can trap and provide the password to the library. Please note that the process of creating the invoice document will be halted while until this event returns control to Software Development Kit library. Microsoft Word needs to be installed on machines that are using this feature and it has to be configured properly. For instance, some versions of Word will need to do certain configuration for first time use and therefore, it is developers' responsibility to ensure that Word is configured properly and will not be displaying pop-ups of this nature. Our Software Development Kit test application has been amended to provide sample code in handling this event.
- 6) We have added two new options to change user information form, message senders and message recipients. Please note that only unsent messages can be transferred from one person to another. You cannot change the sender of messages that already have been sent. However, you can always transfer messages from one user to another if the user is set as the recipient.

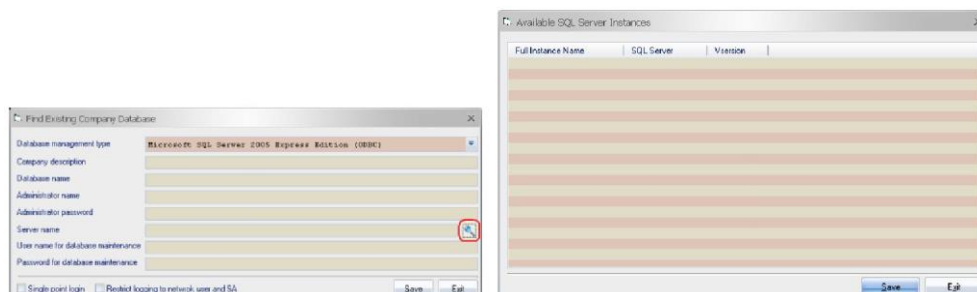


- 7) As you all know, SQL Server 2017 RC2 has been released. We have to host SQL Server database on 2017 platform. We have tested our products with

Release Candidate 2 and everything has worked seamlessly. We will continue our testing as Microsoft releases new versions of this product but unless Microsoft makes changes drastically, we are not anticipating any issues using this platform. If you are planning to move to this new platform, we recommend you to install SQL Server 2017 platform on a test environment and test Synergy products that you are using on this new platform.



- 8) We have added a new button to our company upgrade form that allows administrators to discover all the SQL Server instances accessible from the machine. The ability to type the server and instance name is still available. Please note that the first time this button is clicked, the information is gathered and caches for any subsequent use. This is done deliberately for performance reasons. Enquiring the instance names on each button click could impose unacceptable over heads. Please also note that if an error occurs during the caching of the instance names, the button will be made invisible and you will have to enter the server and instance name manually as was the case in previous versions. To refresh the instance name, the form has to be closed and reopened before clicking the button again.



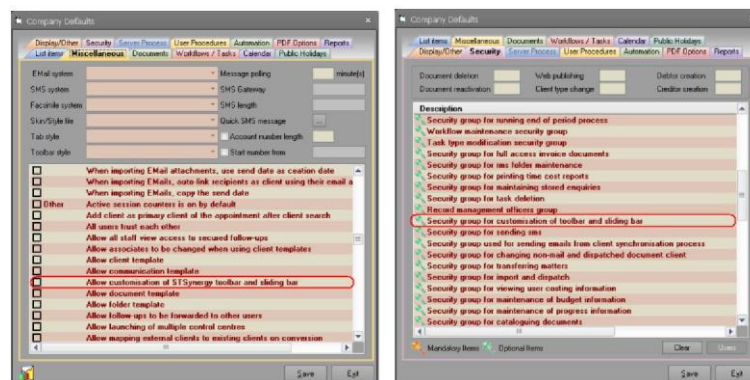
Please also note that this information is also subject to a number of other usual rules such as SQL Server TCP and UDP ports, SQL Server browser service, and Firewall rules. Although we have provided this list, Microsoft documentation states that this method may not always work. Here is Microsoft documentation on enumerating SQL Server instances.

The computer running the instance SQL Server might not receive responses to the EnumAvailableSqlServers method in a timely manner. The returned list might not show all the available instances of SQL Server on the network. When you call the EnumAvailableSqlServers method in subsequent tries, more servers might become visible on the network.

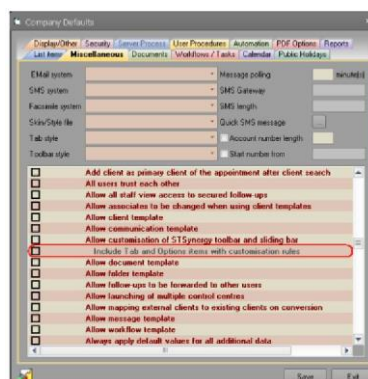
This method fails to list the local instance if a firewall is operating on the server. The firewall blocks any broadcast traffic issued when the method is called, even if the sender is from local machine.

For more information, look for the topic "SQL Server Browser Service."

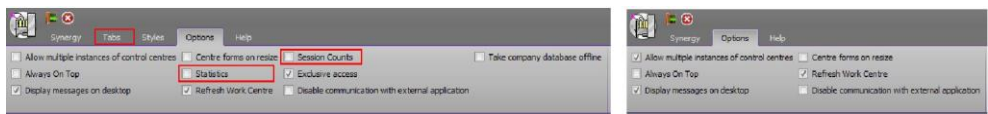
- 9) Synergy allows administrators to specify whether users all allowed customising the user interface. To do this, administrators will need to turn on the customisation check box in the "Miscellaneous" tab. Once this is done, then they can optionally use a security group to specify the users that are allowed to customise the user interface using the following customisation security group. These settings are meant to allow administrators to deploy a uniform user interface across an organisation and stop users from changing the look and feel of the application.



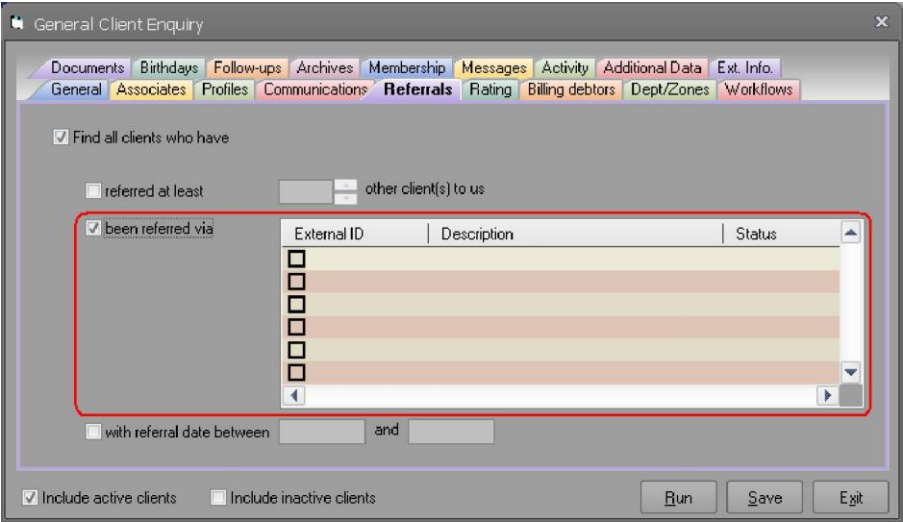
We have been informed by some clients that the "Tabs" ribbon bar item, "Statistics" and "Session Counts" check boxes from the "Options" tab were being displayed for everyone and was not considering these settings. To preserve the previous behaviour and allow these customers to fully deploy a uniform user interface, we have added a new setting to allow these items to be included with the customisation rules. The new setting will only be available if customisation is turned on.



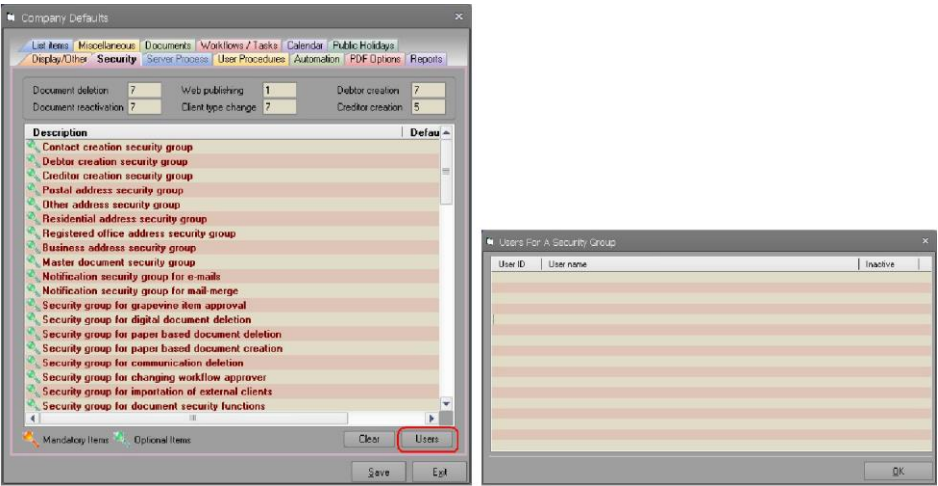
From this version, these items will only be visible for those users that are meant to have the ability to customise the user interface and will be hidden from others should this new setting be turned on.



- 10) We have changed the enquiry form to allow selection of multiple referral sources. Please note that if you do not place check marks next to those that you need, Synergy will use the highlighted referral source. When selecting multiple referral sources, Synergy will extract all the clients that have at least one of the selected referral sources.

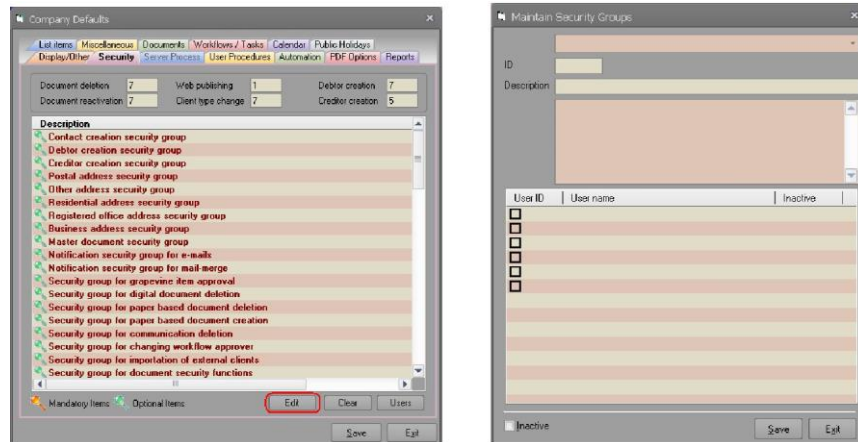


- 11) In the security tab of the company defaults form, when administrators were clicking the “Users” button, Synergy was displaying the list of users that belonged to that security group.

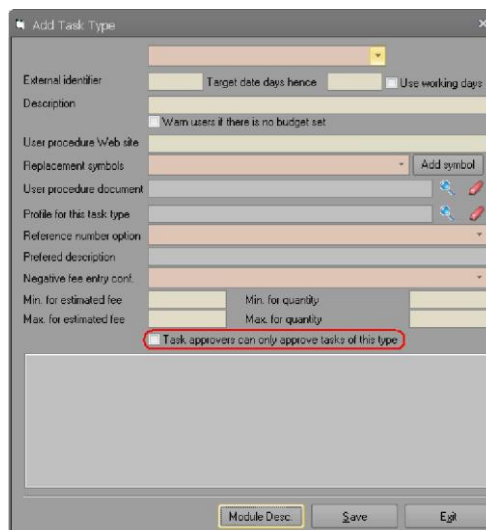


However, administrators were unable to adjust the security group by adding or removing users from this form. The alternative approach of closing the form and using the security tab of housekeeping to do this was quite time

consuming. We have added a new “Edit” button that allows administrators to amend the security group from this form. Please note that this button will only be enabled if the selected list item is configured with a security group.



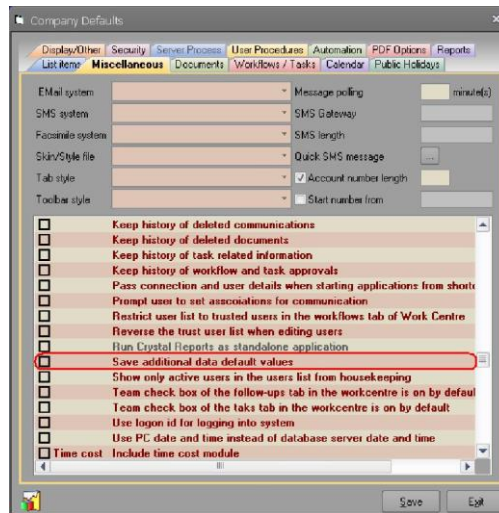
- 12) When the “Task approvers can only approve tasks of this type” setting was turned on a task type, only the approver of the task could approve the task and no one else. This facility allowed administrators to stop users approving task and matter if there was an active critical task of this nature present on a matter. Administrators could not configure the approver of such tasks as teams. Although this may be perfect for many organisations, a side effect of such setting is that when the approver of such tasks leaves an organisation, all of these tasks had to be transferred to the person’s replacement. In this version, we have allowed teams to be used as approver of these types of tasks. Synergy and SDK will now perform an extra check to ensure that when a team is set as approver of such tasks, then the user is a member of that team before allowing the task approval to proceed.



- 13) We have fixed a bug in our Software Development Kit related to task approval. In some cases, if user that was approving the task was not set as the approver of the task, it was returning an error assuming that the caller was trying to change the approver of the task rather than checking the full approval rights of the user for the task. We have fixed this bug on this version.



- 14) When “**Save additional data default values**” configuration was turned off, Synergy was creating a blank row (a single row in ZZROW table and nor rows in the additional data cell tables ZZVD\*) if the user left the additional data columns with their default values. This bug is fixed on this version and we have invested extra ordinary amount of time to test and ensure that the system does not have any unintended consequences. However, we recommend you to test your additional data requirement thoroughly as it is impossible for us to conduct testing of every possible configuration that every one of our customers may use.



- 15) We have fixed a bug in our Software Development Kit related to synchronising the postal and residential address of a client. When setting the residential address to be the same as the postal address, Software Development Kit was ignoring synchronising residential country in some rare cases. We have fixed this bug on this version and country of the residential address will correctly be synchronised.
- 16) We have added a new property to the client class in our Software Development Kit to assist developers to disable the client account number field if the system is configured that way. This was not possible in the previous versions. We have also amended the client creation form in our sample Software Development Kit application that will assist developers to see how disabling of the account number field can be accomplished.

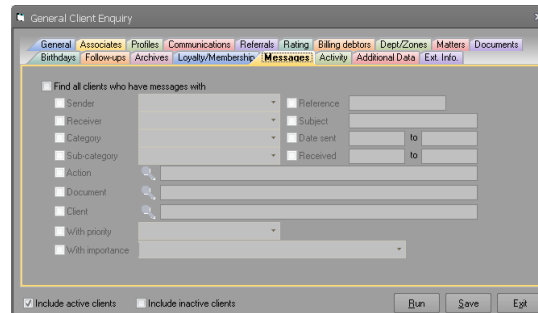
- 17) When placing task on hold, the hold reason drop down box will display the reasons that are linked to the task type if there are any. In this case, all hold reasons including inactive reasons were included in the list. We have removed inactive hold reasons from being displayed in this version. Also, when viewing hold details, Synergy was always displaying 1 as number of days on hold. This has been fixed as well in this version.

The screenshot shows a dialog box titled "Place Task On Hold". It contains the following fields and controls:

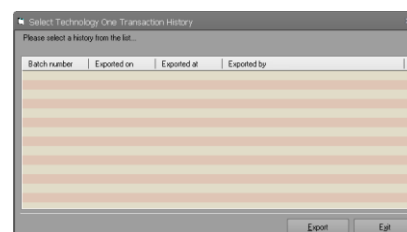
- Reason for hold-up:** A dropdown menu with a red border.
- Hold task for:** A text input field containing the number "1" with a red border, followed by radio buttons for "business day" and "calendar day".
- Comments:** A text area with a "Comments" button and a magnifying glass icon.
- Current target date:** A date input field.
- Revised target date:** A date input field.
- Follow-up categories:** A dropdown menu.
- Follow-up types:** A dropdown menu.
- Follow-up due on:** A date input field.
- Follow-up importance:** A dropdown menu.
- Buttons:** "Save" and "Exit" buttons at the bottom right.

**Modification as at release 11.00.09a**

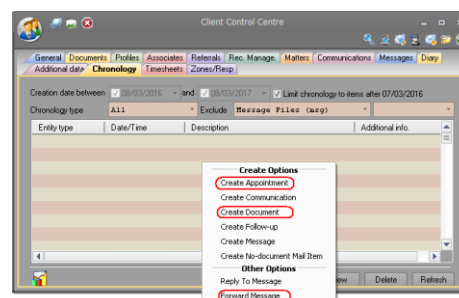
- 1) Fixed a SQL statement syntax error in new enquiry form. This was related to the enquiries on messages tab.



- 2) Some operations in Synergy require the default printer to change to a printer capable of printing in a specific paper size. For instance, the Technology One review and export functions in Synergy require a printer capable of printing an A3 size report in landscape mode. In these cases, Synergy searches the user's printer list to locate a suitable printer and once that is located, it set that printer as default printer. Once the default printer is set, Synergy broadcasts this change to all the processes on the PC in a synchronous mode. Because of this synchronous broadcast, if a process of the PC is blocked, it will not respond to Synergy's broadcast message and the process will block until the process responds to the broadcast message. We have changed this broadcast message to be asynchronous so that Synergy simply broadcasts the message but does not wait for responses. This could improve the processing speed quite considerably when blocked processes are present on a PC when such processes are run.

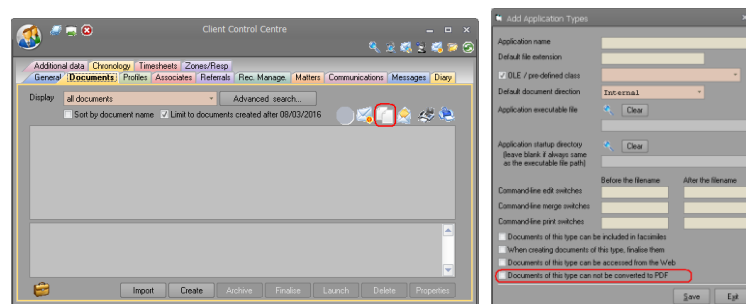


- 3) We have fixed a few bugs in the chronology tabs. Creation of appointments and documents were crashing the application and using forward message pop-up menu was not working as expected. All these bugs are fixed on this version.

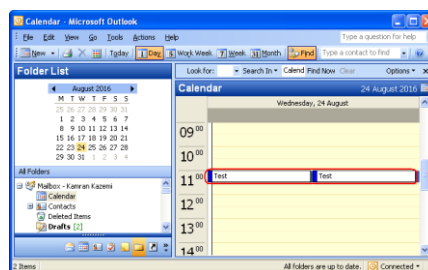




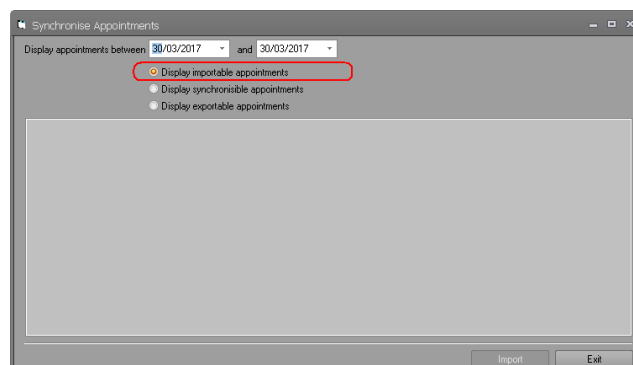
- 4) As everyone knows, new versions of Microsoft office (Office 2010 and later) support saving Word, Excel and PowerPoint documents as PDF. As a consequence, there is no reason to use the standard GhostScript printer for converting these documents to PDF when they are being copied. In this version, we have changed the mechanism of converting these documents to PDF to use Office's save as PDF feature. This is transparent to users and there is no setting to be turned on for this feature to work. Synergy will simply use this feature instead of the GhostScript printer. Please note that when saving to PDF using this new method; Microsoft office application will be the currently active process and if you click on Synergy application the standard Windows "Switch to" message box will display. However, office application is made invisible in some instances, clicking Switch to button will not activate the relevant Office application. Please note that currently, you can only secure the PDF file through Microsoft Office user interface and hence there is no way to automate this. We will keep an eye on this to see when Microsoft fixes this and when fixed, we will amend the code to create a secured PDF using this method. Please also note that the application type setting is still used to determine if Synergy administrators have allowed conversion to PDF for these document types.



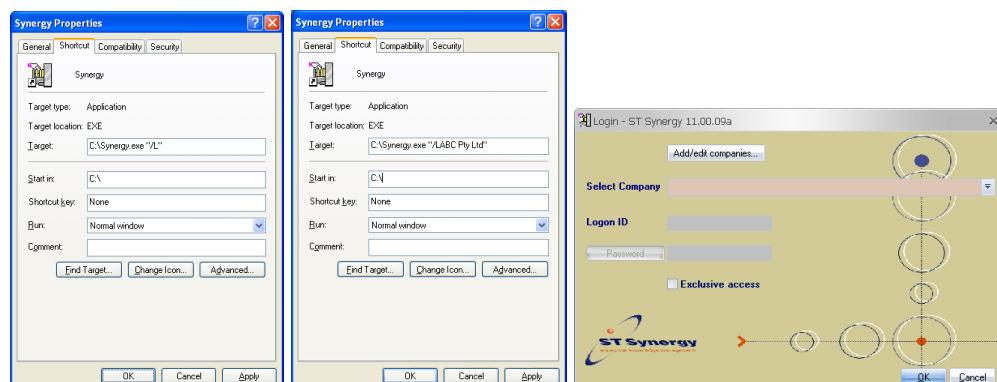
- 5) Some supporting executables are installed as part of Synergy installation that helps Synergy with various tasks. Synergy application was looking for these supporting executables in the application directory if a directory was passed to the application using /A command line switch. We have changed Synergy to look for these executables in the installation directory (where Synergy application is running from), normally "C:\Program Files\STSynergy" or "C:\Program Files (x86)\STSynergy" folder since there is no guarantee that those executables exist in the folder passed using /A command line switch.
- 6) Synergy was creating multiple appointments when synchronising Synergy appointment to outlook. We have done preliminary work for synchronisation of Synergy appointment with iCloud calendars and this bug was a result of that preliminary work. This bug is fixed on this version.



- 7) We have fixed a bug in importation of outlook appointments. Synergy adds the primary key of the appointment as a custom property to outlook appointment so that any amendments to the appointment after importation can be reflected in outlook appointment as well. During the importation, Synergy was adding the primary key of the header record for appointment as custom property rather than the primary key of appointment itself. In instances where these two primary keys were different, searching for the appointment could return the wrong outlook appointment and therefore cause the incorrect appointment to be manipulated. Please note that this bug only applies to the importable appointments in the “Synchronise Appointments” form. This bug is fixed on this version.

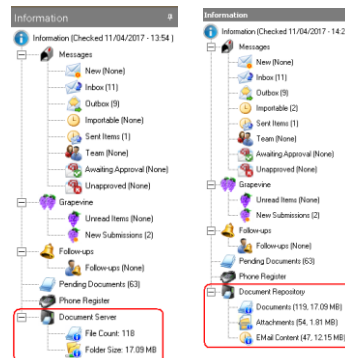


- 8) In previous versions of Synergy, we added a /L command line switch that allowed Synergy to auto-login the user to the last selected company. We have further enhanced this feature so that one can specify the name of the company along with this command line switch. This will allow Synergy shortcuts to be configured to logon to any required company rather than restricting it to the last logged on company. Therefore passing “/LABC Pty Ltd” as command line switch will attempt to find a company called ABC Pty Ltd in the start up and select that company. If the company exist, Synergy will then attempt at logging in. Please note that double quotation marks character (") is the delimiter for command line switches. Consequently, we strongly recommend you to avoid using this character as part of the company name. Should you need to use this character; please ensure that you use it in such a way to avoid any errors.

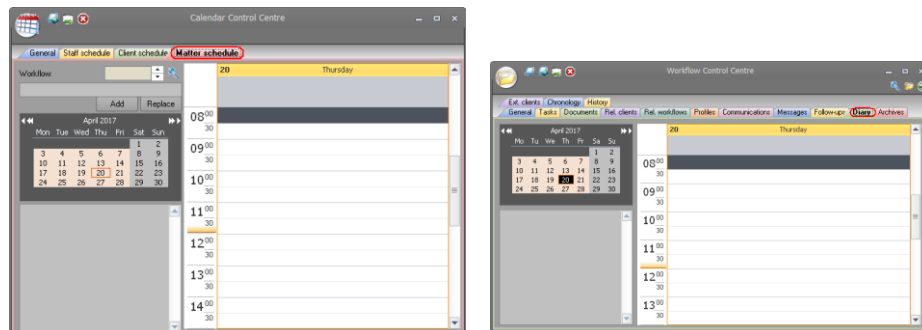


- 9) In previous versions, we added a new shortcut bar item to display the number of files and size of the current document repository when document security or

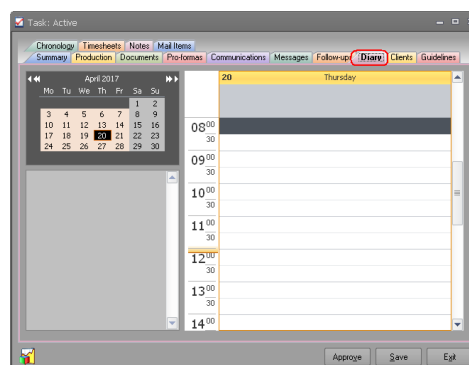
automation server was not configured. This allowed administrators to easily see the details and create a new document repository when the system warns them (when data is displayed in red font). We have extended this to include the attachments folder, recycle bin folder, and Email content folder as well. This should allow full control of when administrators should create a new folder. We have changed the Synergy application to refresh this information along with other counters in the shortcut bar on system scheduled intervals. In previous version, the information was only refreshed when a manual refresh was requested.



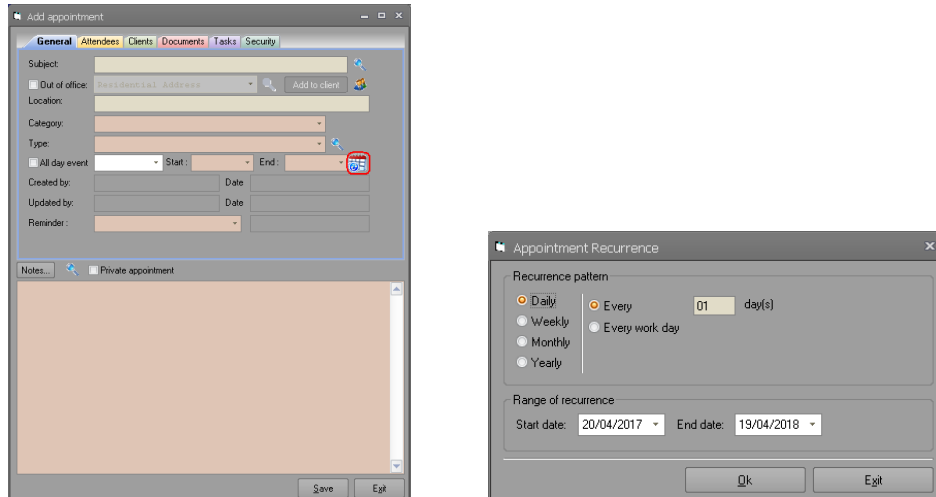
- 10) When appointments were created from the diary tab of Matter Control Centre or the matters tab of the Calendar Control Centre, the primary client of the matter was not being added to the appointment. This has been fixed on this version.



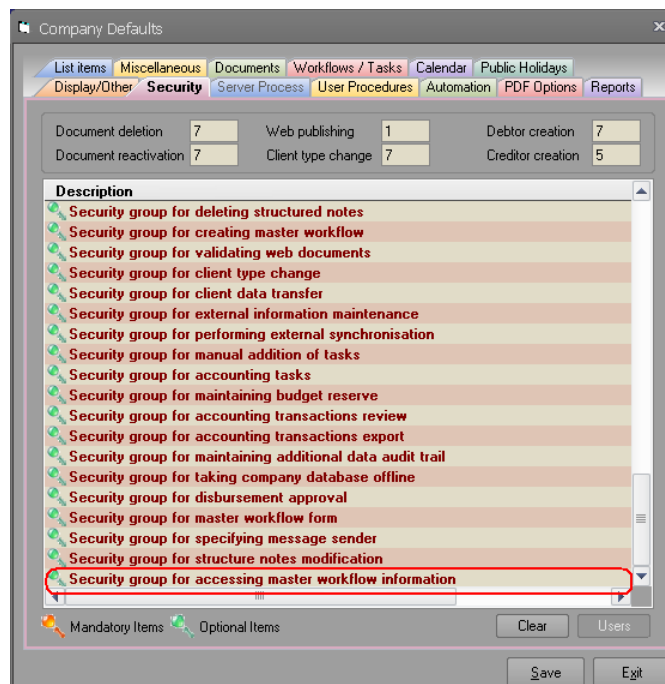
- 11) When creating a recurring appointment from the diary tab of the task edit form, the recurring appointment was not being added to the task. This has been fixed on this version.



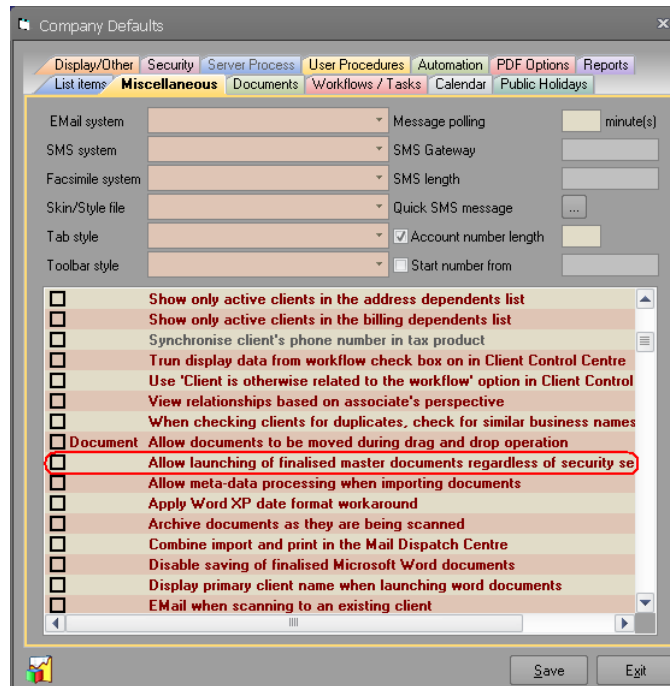
- 12) We have also fixed a bug related to recurring appointments. In cases where the primary key of the appointment header record and appointment instance record got out of sync, the recurring appointment was either not exported to outlook calendar or wrong appointment was getting updated. This is fixed on this version.



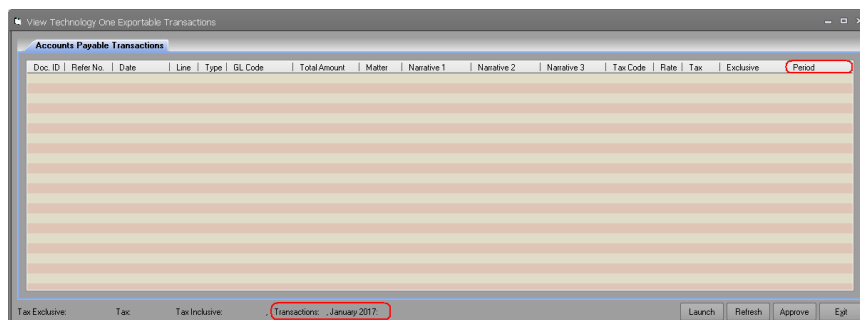
- 13) Added a security group that will administrators to control who has access to edit master matters. By default, everyone will have access until this security group is set. Please note that with this security in place, only staff within this security group will be able to modify master matter details including task and delegations. This is mainly done from the Matter Control Centre and sometimes from Workcentre and Job Control Centre. All features from these centres have been amended to consider this new security group. We will extend this feature to other forms when time permits. Software Development Kit has also been amended to disallow modifying master matters.



- 14) Fixed a bug in security of master documents related to below housekeeping setting. Synergy was not allowing users to launch a master document when this setting was turned on.



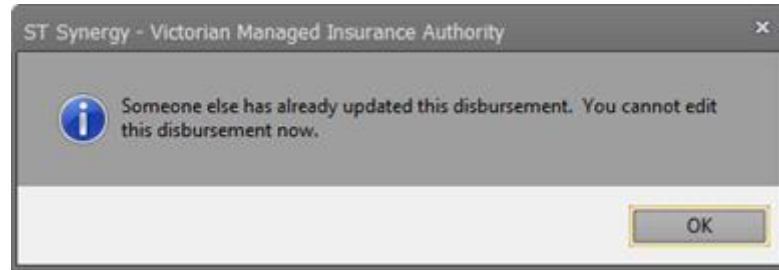
- 15) Added the billing period to the Technology one review and export form. This should help those users that are reviewing/exporting the Technology One transactions to see how many billing periods are being processed. The total number of transactions and number of transaction for each billing period is also displayed along with the total amounts. Please also note that when there are multiple billing periods or a future billing period in the list, the totals are displayed in red bold font.



- 16) In previous versions, if a master matter had 20 tasks and each task had a single delegation, creating a matter from this master was generating 20 primary keys for the task and delegation table. However, if the first task on this master matter is a decision, only one primary key was needed because the other 19 tasks would be created when the decision is approved. In this case, the user interface was wasting 19 primary keys and hence reducing the number of records that could be stored in the task and delegation tables. Although the task and delegation domain has the ability to store in excess of 64 billion records, it is still unwise to waste primary keys. We have optimised Synergy

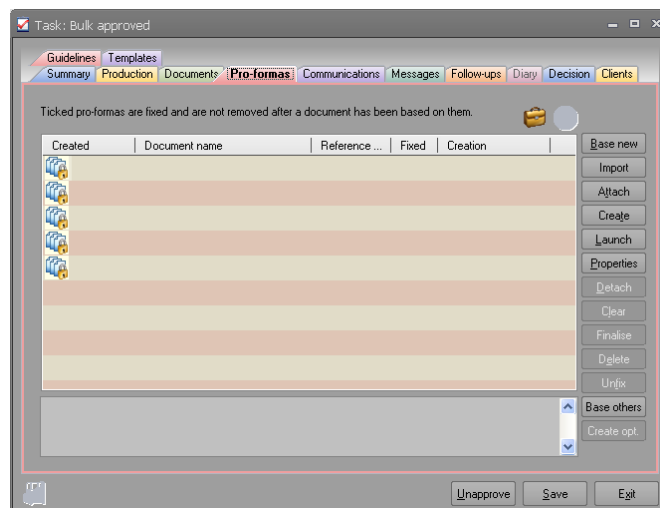
in this version to avoid wasting primary keys when creating matters from masters. Please note that our Software Development Kit was already optimised in this respect.

- 17) In some instances, when trying to save a disbursement, users were getting the following message.



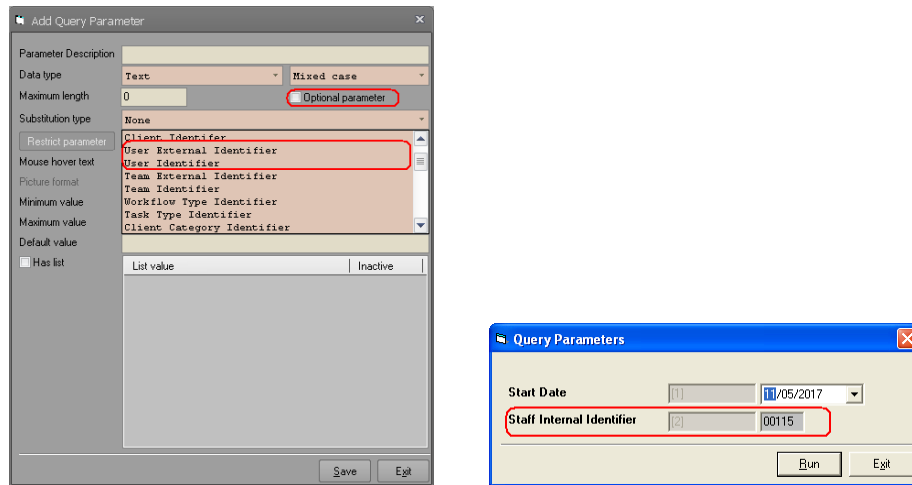
Further investigation demonstrated that Synergy was displaying this message because there was a mismatch on last update time of the disbursement which was caused by comparing a single floating point number against a more accurate decimal number. The single floating point number is never as accurate as a decimal number and hence in rare occasion, this comparison was failing. This is fixed on this version.

- 18) Fixed a bug in pro-forma tab of the task form. Although, you should define all pro-forma documents as master, list was ignoring non-master pro-forma documents. This is fixed on this version. This bug was also causing the application to crash when using Microsoft Access database back-end which is fixed now.

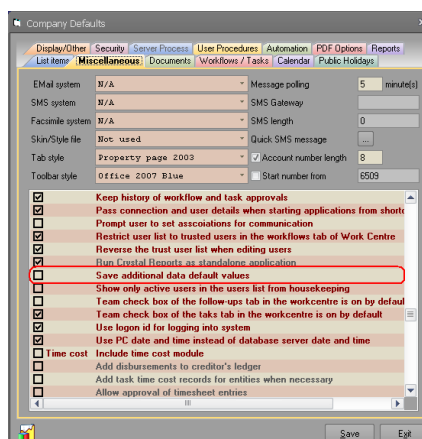


- 19) When users run a report in Synergy, containing user internal or external identifier query parameter, from favourite tab in Workcentre, this parameter is set to logged user's details, the user interface elements are disabled and user cannot change the parameter values. However, if you run the same report form the Reports Gallery, the parameters form will display an enabled list of users that you could select user from. However, if you define these parameters as optional, Synergy was passing the default parameter value when running them from Workcentre because the user interface element was locked

and therefore Synergy was not detecting any changes in the entered value. This bug is fixed in this version and those reports should work as expected from both places.



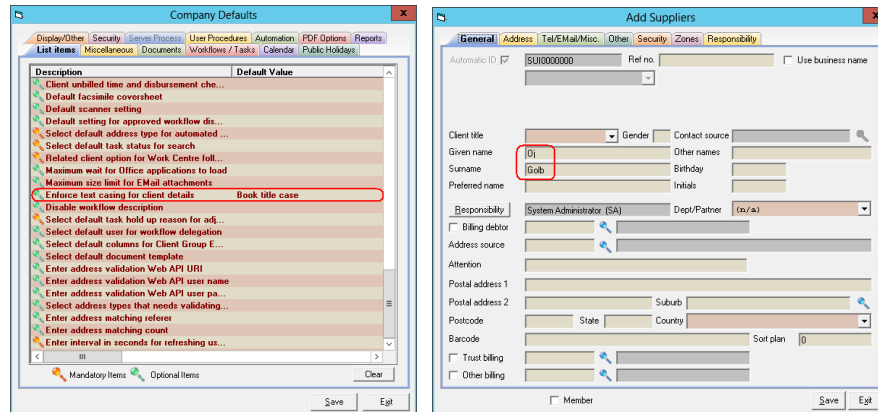
- 20) We have altered our upgrade process to preserve the recovery models of SQL Server databases. In cases where the database model was not set to simple, upgrading the database was changing the recovery model to simple in SQL Server versions prior to SQL Server 2012 because Synergy was setting “select into/bulkcopy” database option before start of the upgrade process. This was changing the recovery model to simple. This change is transparent and users do not need any changes to the way upgrades are done
- 21) We have fixed a bug in additional data form. When two consecutive fields had the same default value, leaving the second field as default was not saving the field when you had “**save additional data default values**” housekeeper setting turned on. With this version, we have fixed this issue. Please note that a blank row will be created when the above housekeeper setting is turned off and all fields are left with their default values in this form.



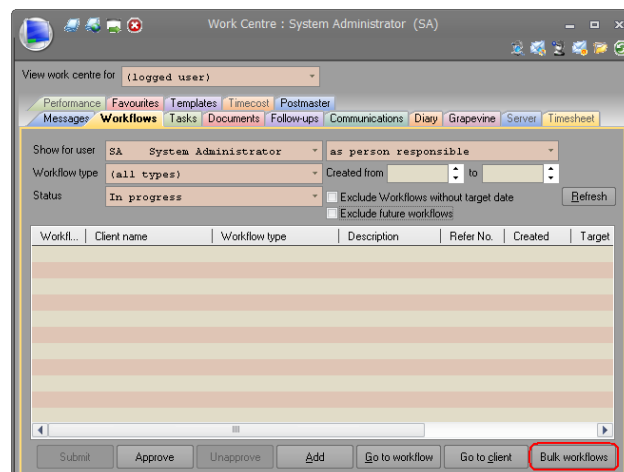
- 22) We have fixed an error in the additional data form. It was not detecting changes correctly through user interface and in some scenarios (e.g. adding, editing and saving external information) was not displaying and saving the correct data. This problem has been fixed. We recommend you to update

your Synergy to this version if you have identified issues with displaying and saving additional data.

- 23) Fixed a bug related to Synergy's ActiveX component. When using bookcase for client details such as names, addresses, if users entered the first character of the first name or surname as lower case letter, Synergy was reversing the entered string. If users entered the first character of the first name or surname as upper case letter, Synergy was working as expected and the entered string was displayed correctly. Also, when using bookcase mode, users were unable to enter multi word names or surnames. The image below displays how Jo Blog was being displayed before. These have been fixed in this version.



- 24) We have added a “Bulk matters” button to the matters tab of the Workcentre. This provides identical functionality as the bulk matters in the messages tab just that the user would not need to select a message.

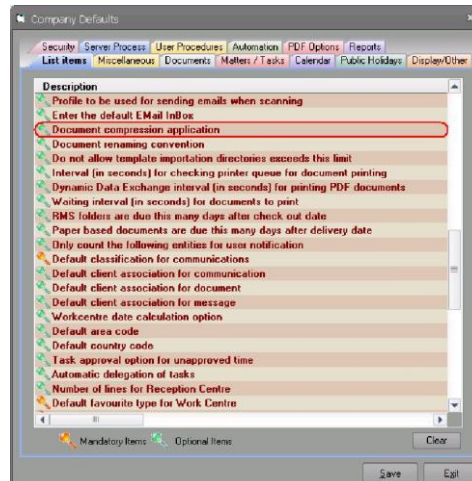


- 25) Synergy allows email attachment to be renamed and compressed before sent to the recipient. In previous versions, there was provision to use WinZip, WinRar, and Zip from InfoZip to compress these files. In this version we have removed all these compression options. We are using .NET based compression libraries to achieve this. By using these libraries, the compression will hopefully be much faster specially when the compressed files have to be renamed. As you are well aware, the document names in Synergy are 8 alphanumeric characters. The above tools did not provide ability to compress a file with a specific entry name. Therefore, there was no choice but to copy the file

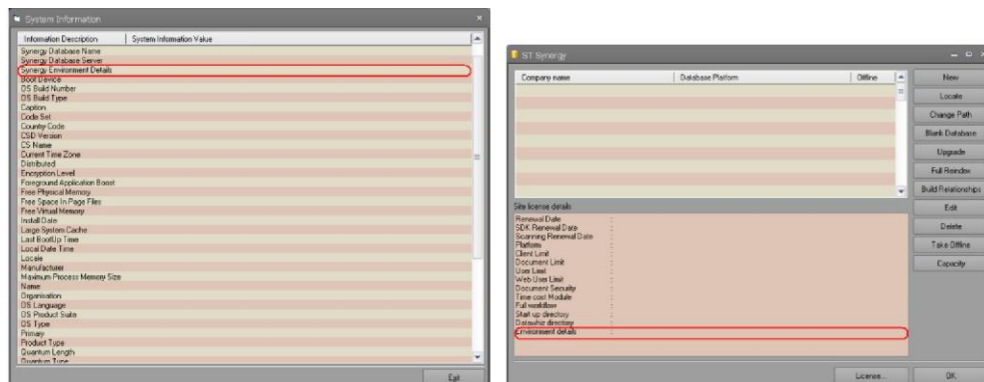


into a temporary folder with the new name and then use the copied file for compression. Using the .NET based libraries allows Synergy to perform this compression in one step removing the additional overhead associated with the file copy. This will considerably increase the performance of the compression during email transmission.

Please note that the following option “Document compression application” has been removed from the company defaults form in the housekeeping as it is no longer relevant. Document renaming convention will still be used if it is configured.



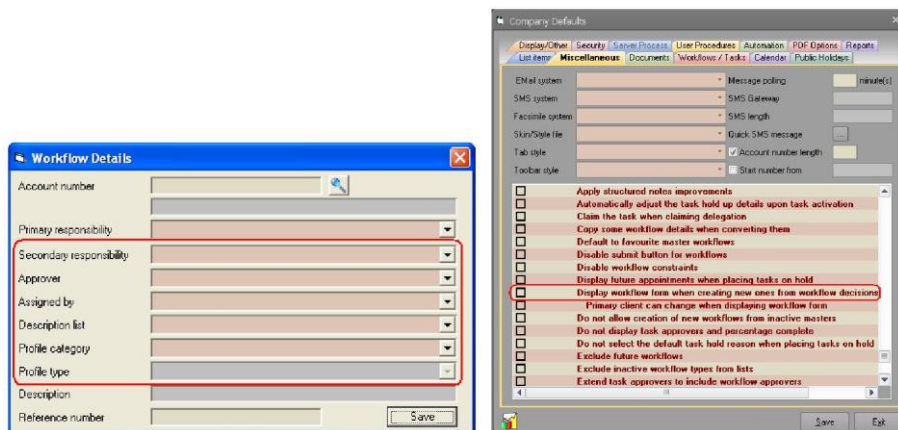
- 26) Synergy now displays an environment identifier in the company upgrade and system information forms if environment details are embedded into the license file.



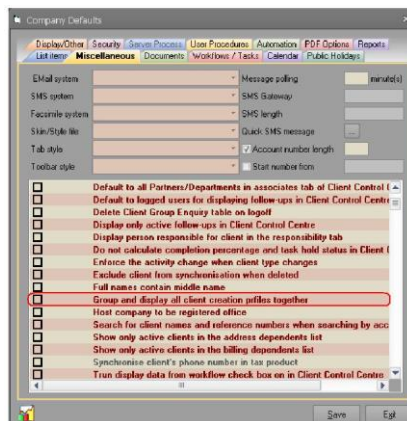
- 27) When using cache mode or creating invoice documents, a temporary Microsoft Access database called “Attached Database” gets created and all of the tables from the Synergy database gets linked to this intermediate database. Given that there are hundreds of tables in Synergy database, linking them to this intermediate database takes quite a while. We have added CreatingAttachedDatabase, CreatingAttachedDatabaseFailed, and CreatingAttachedDatabaseSucceeded events to invoice and master matter classes in our Software Development Kit to indicate when the library attempts to create this database and the outcome of it. Users can handle these events and display some message in their forms to indicate to users as to what is

happening. Please ensure that when handling these new events, you do not block the process by displaying a message box or a modal form. This will stop the process and the library will never be able to complete the process. You should just display some text on a label or a text box and return immediately so that the process continues. Please look at the invoice creation form in our sample SDK test application to see how to handle these events.

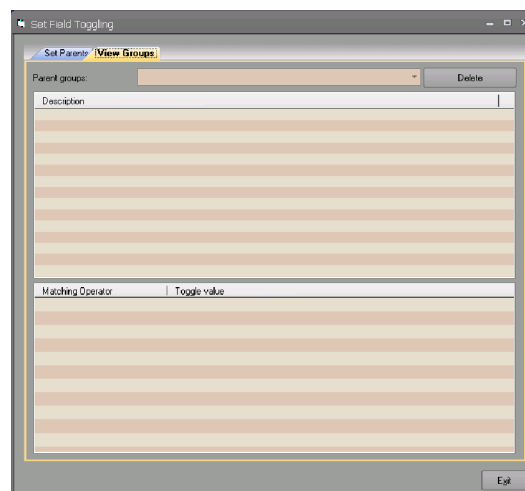
- 28) We have also added ability to change users of a matter as well as adding profiles to a matter. Some other properties have also been added to matter class to indicate whether the matter users have changed. The users and profile can only be set after the matter has been created, that is, there is no facility to change these as part of creating a matter using a master matter class. The only time that a user may be able to change these as part of matter creation is when a decision results in creating a new matter and Synergy is configured to force display the new matter to user for editing using the following housekeeping option.



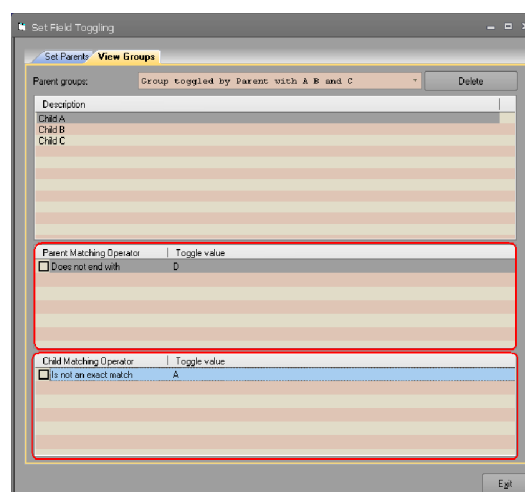
- 29) We have fixed a bug related to capturing of the mandatory client creation profiles related to the following housekeeper setting. When this setting is turned on, all mandatory client creation profile category were meant to be displayed together and selection of any one of the profile types were meant to be sufficient. In essence, in these cases, the user was forced to select at least one mandatory profile type among all of them. Our SDK was enforcing the selection of all mandatory profiles and was ignoring this setting. This has been fixed now.



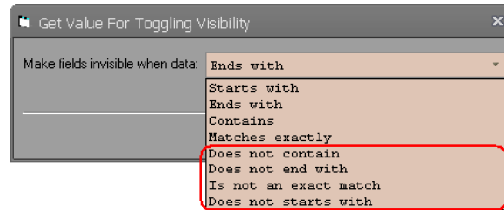
- 30) In previous versions, we introduced the ability to make additional data and replacement symbols invisible based using a parent child relationship between entities. The visibility/invisibility conditions were always stored at the parent entity. This was useful for cases where all children should have been made visible/invisible at the same time. As can be seen from the image blow, there is only one list for defining the visibility/invisibility conditions. Cases where different children had to be made invisible based on different condition on the parent entity were not catered for.



Imagine you have a drop down with list entries A, B and C. You may set up 3 drop downs, first one with A1, A2, A3 as list entries, second one with B1, B2, B3 as list entries and the last one with C1, C2, and C3 as list entries. Synergy in no way would allow you to make first drop down visible when A was selected on the parent drop down and hide the other two. Similarly, it was impossible to show the second drop down when B was selected on the parent and so on. In this version we have allowed the visibility/invisibility to be stored at the child entity as well as the parent entity. This will allow appropriate conditions to be stored for each child separately. As you can see from the image below a new list view will all you to define the proper conditions for each child separately should you wish to do so.



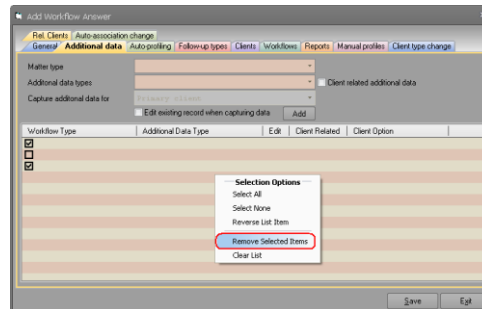
We have also added the non-matching string operations to Synergy. So administrators can now show/hide controls based on these non-matching string operations. Please note that the conditions are examined in the order that they are entered. There are no implicit or explicit precedence among these operators.



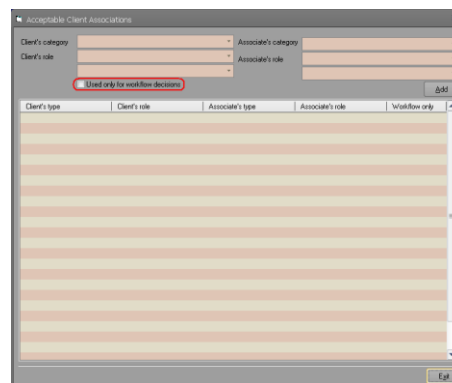
Our Software Development Kit has been amended to cater for this change as well. ChildVisibility property of the document replacement symbol and additional data column classes were always being called from the parent entity. This property was only expecting the current value stored against the parent entity to be passed as parameter. In this version, you will also need to pass the visibility conditions stored on your child entity that you are seeking visibility for. You can check our Software Development Kit test application for a sample code.

### *Modification as at release 11.00.09*

- 1) Fixed a bug in deleting additional data setting from workflow answers. When deleting the selected entries, Synergy was deleting the wrong entries.

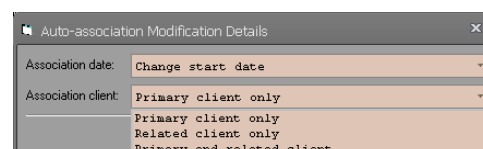
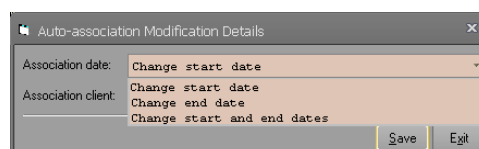


- 2) Added a new flag to valid associations called “Used only for workflow decisions” that allows administrators to store association details which will simply be ignored as part of creation or modification associations. These types of association configurations will be used for auto-modification of associations from workflow decisions described in below item. Our Software Development Kit is also amended accordingly.

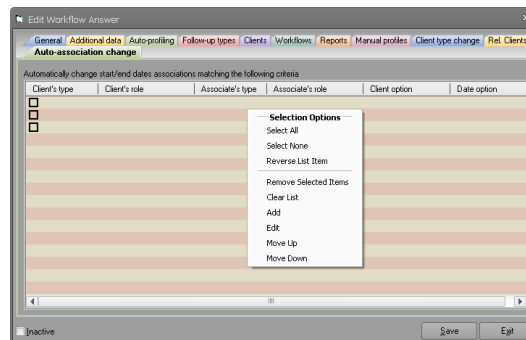


- 3) Added a new facility to allow client associations to be stamped with start or end date from workflow decisions. Valid association are used to store the client and association types. Our Software Development Kit is also amended accordingly.

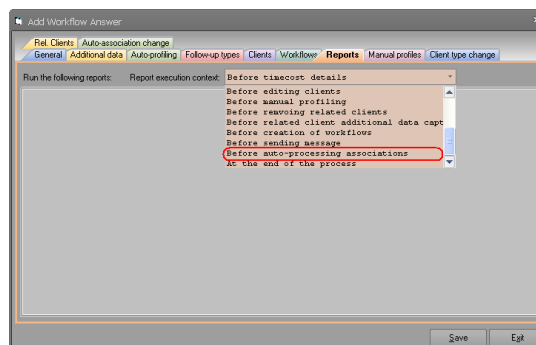
Please note that administrators can specify whether the association should be stamped with a start date, end date or both. They can also enforce that one side of the association must be either primary client or a related client of the workflow. The other side of the association could be any other client matching the stored configuration. Additionally, administrator can enforce the association to be between the primary client and related client of the workflow.



Multiple configurations can be stored allowing users to start/terminate as many associations as needed.

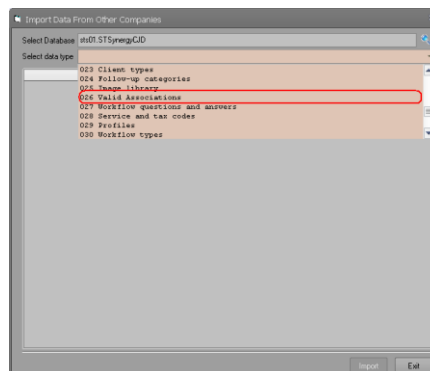


- 4) Decision process has been amended to allow start/end date of associations to be stamped. Please note that a date must be specified by the user for use with this process. When entering the date, it will default to the completion date of the decision that is being approved. We have also added facility to run reports before processing associations just like any other stage of the decision process. Our Software Development Kit is also amended accordingly.

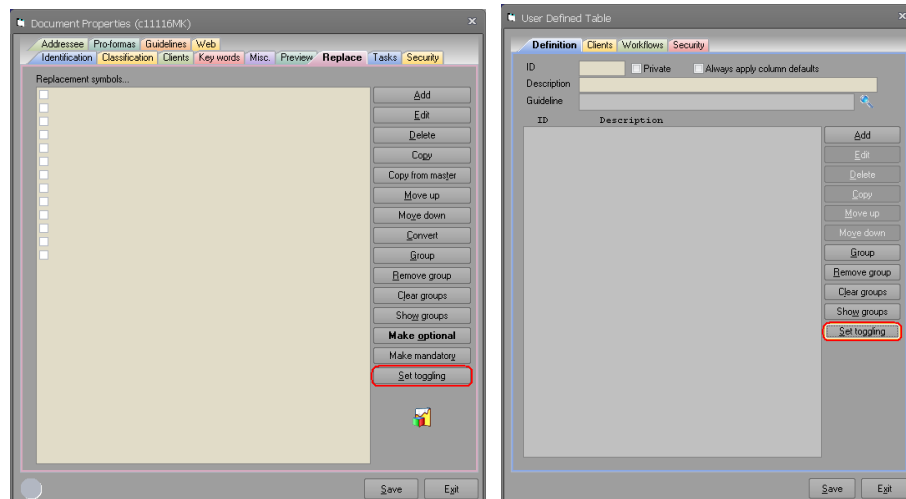


- 5) In light of the above changes, we have enhanced our own importation tool on support tab of housekeeping to allow copying of valid associations. This will assist in copying of the auto-process configuration for associations.

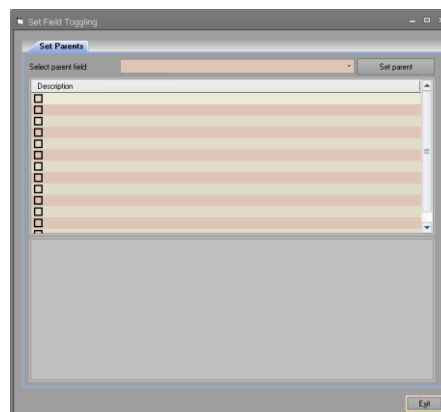
**Please note that features in support tab are strictly for use by ST Synergy Staff and is not for use by clients. Do not use any of the features in the support tab even in the unlikely event that you have miraculously worked out the support password.**



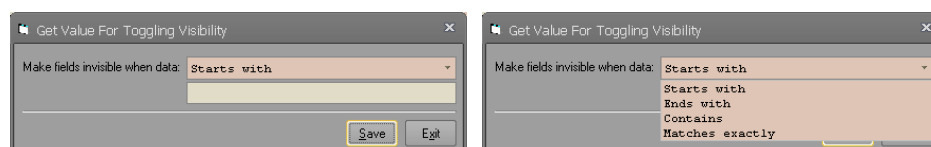
- 6) Added ability to toggle visibility of replacement symbols and additional data fields based on content of other fields. Please note that this can be used to more user friendly interface. When fields are invisible, the original values will be passed for processing not those that have been entered/selected last. Our Software Development Kit is also amended accordingly.



The following form will allow users to set parent field for toggling visibility of other fields. From the parent field drop down, select the field that you want to use to control other fields and then select any number of fields that you want to toggle visibility from the list view. Once these are done, click the set parent button. This will combine these fields as one group controlled by the selected field in the drop down.



When setting parent/child groups, you will have to specify values of the parent field that will make the children invisible. The following form will help you to set these values. We have allowed users to use various matching methods.



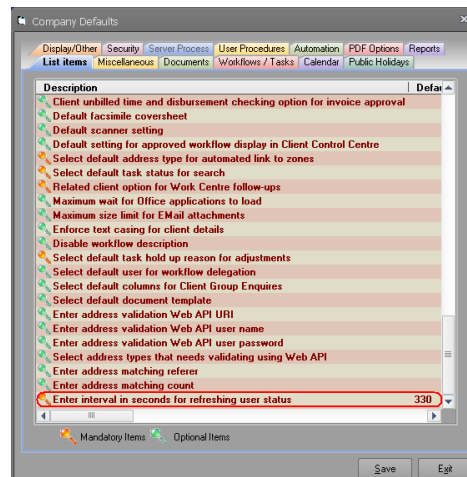
- 7) We have fixed a bug in query parameter form. When there was a default value, the newly entered values were being ignored.

- 8) When a replacement symbol or additional data was configured to return the user's full name, the name included a 7 character prefix showing the client category identifier. This has been fixed on this release.

- 9) In previous versions, the support tab password was being stored in the database for each company. **We have mentioned formally numerous times in our release notes that facilities on support tab of housekeeping is not for general use by our clients and it is purely there for use by ST Synergy staff.** We have now completely secured support tab by validating the entered password from a web service hosted on our premises. With this change, no password is stored inside application executable file nor is it stored anywhere in the database. The web service will be configured to allow validation of support tab password when only when ST Synergy staff requires it hence removing the possibility of anyone being able to get to the support tab. **Please be warned that should you attempt at unlocking the support tab by entering a password and pressing OK button, your attempt and details will be logged regardless of whether the correct or incorrect password is entered.**

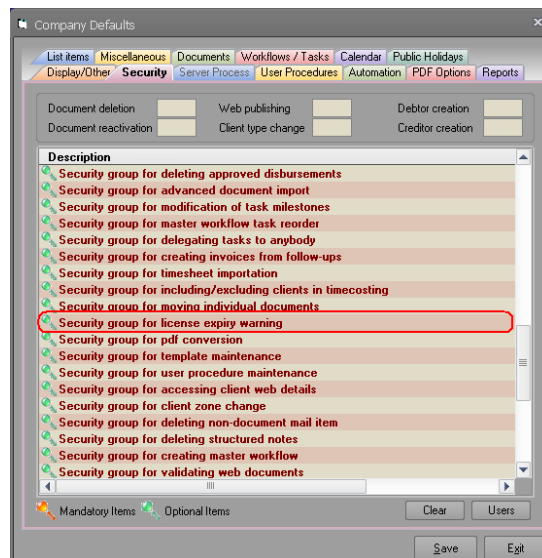
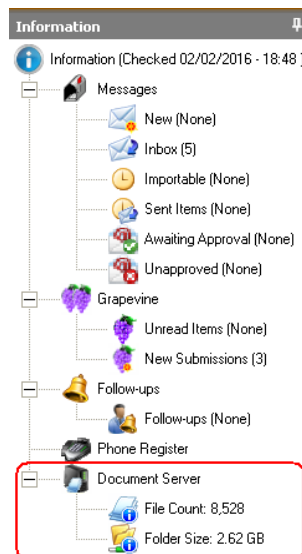


- 10) In previous versions, Synergy was using a hard coded interval of 1.5 minutes to refresh the active session counts. We have now made this configurable. The minimum interval is set to 1.5 minutes (90 seconds) and the maximum is kept at 1.5 hours (5400 seconds). The default is left as 1.5 minutes (90 seconds) on this version. When looking at the session counts, please keep in mind this setting. The higher the value, less frequent updates and hence less accurate information. The lower the value, more frequent updates and hence more accurate information.

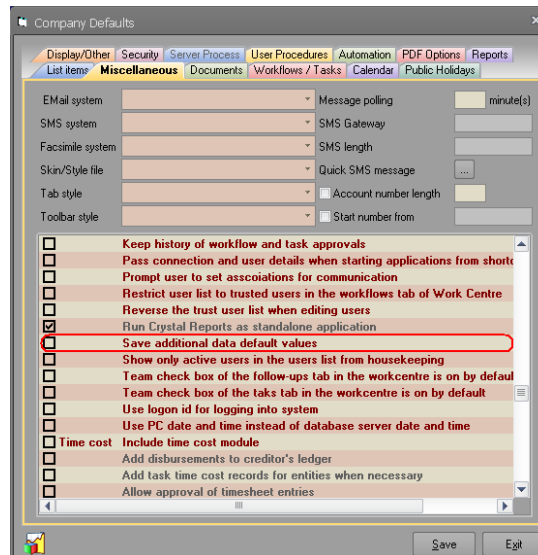


- 11) In version V11.00.05, we introduced two new icons into the information bar for sites that do not run automation server. In this version, we have restricted the view of document server details as follows:

- System Administrator (SA user) will always see this information.
- If security group for license warning does not exist, only housekeepers will see this information.
- If license warning security group exists but has no active users, only housekeepers will see this information.
- Otherwise, only those active users in the license warning security group will see this information.



- 12) In previous versions, the defaults for additional data fields were not being saved to the database. In this version, we have introduced a new company wide setting that allows these defaults to be saved to database when it is turned on. Software Development Kit has been amended to expose this new setting. Please note that it is a developer's responsibility to ensure that the additional data fields are appropriately processed. Software Development Kit library will not save the defaults unless the field is marked as changed. To mark an additional data field as changed, just set the Value property to itself and that will mark the field as changed.



**Modification as at release 11.00.08**

- 1) We have fixed a bug in message templates. When outlook is hosting is turned on, if sties store html type body in a message template, Synergy was setting the Body property of email message to the message body stored in the template. This is now changed. If the message body stored on a message template starts with “<html “or “<html>, Synergy will set the HTMLBody of the email message rather than the Body property. This way, the mail content should be displayed correctly rather than the html code.

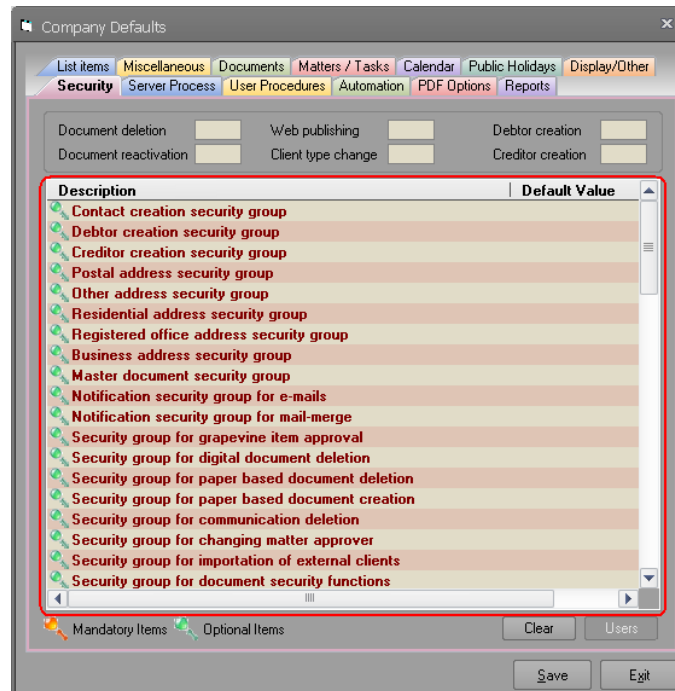
The screenshot shows the 'Template Properties' dialog box. The 'General' tab is active. The 'Message body' field is highlighted with a red rectangle. The 'Follow-up option', 'Follow-up category', and 'Follow-up type' fields are also visible. The 'Inactive' checkbox is at the bottom left, and 'Save' and 'Exit' buttons are at the bottom right.

- 2) Many of our clients had requested the ability to track the movements of users within security groups for audit purposes. We have added this feature to this version of Synergy. From this version on, any user added or removed from a security group will be tracked in a separate table with the information that could be useful for auditor such as:
  - Exact date and time that activity occurred,
  - Was the user added or removed from security group,
  - Which Synergy user performed the activity,
  - Which PC did this activity occurred on,
  - The network user name that was logged on to the PC at the time,
  - The IP address that was assigned to the PC at the timePlease note that this table only tracks the movement of users within security groups. It does not track the usage of the security group within Synergy.

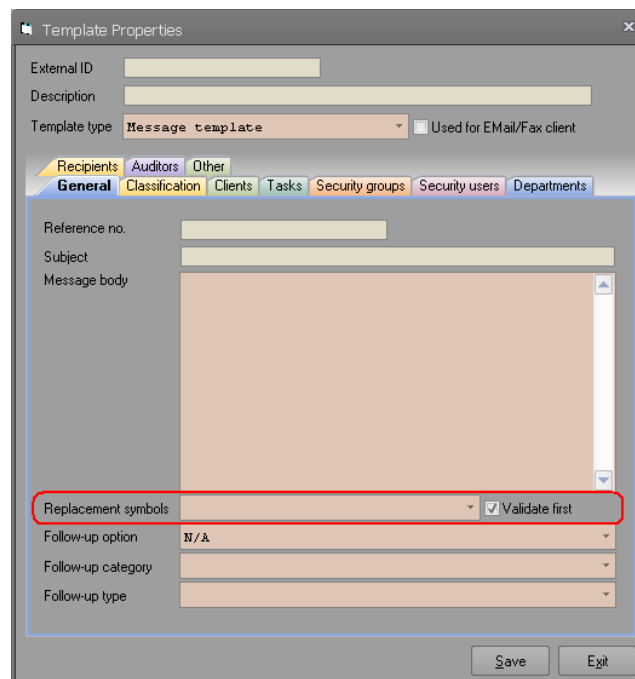
Please note that when upgrading to this version, a record will be created for every user that is linked to security groups. The tracking information will be that of the person that has performed the upgrade process. Should IT Department be performing the upgrade, then the network and PC details will be that of the person that did the upgrade. Please note that upgrades always use the System Administrator as the Synergy user.

- 3) To further enhance tracking of user movements within security groups, we have enhanced Synergy to track usage of the security groups from the Company Default form. From this version onwards, any changes to the security groups used in this “Security Groups” tab of this form will be tracked. The following information will be kept in the audit table:
- Exact date and time that activity occurred,
  - What functionality was effected by the change
  - Which security group was removed,
  - Which security group was replaced it,
  - Which Synergy user performed the activity,
  - Which PC did this activity occurred on,
  - The network user name that was logged on to the PC at the time,
  - The IP address that was assigned to the PC at the time

Please note that when upgrading to this version, a record will be created for each functionality that was restricted in the system. All of the caveats regarding upgrade in the previous item apply to this item as well.



- 4) We have allowed replacement symbols to be planted into a template message body. The replacement symbols can be filled by asking the creator of an email to use an additional data table. This way, the data placed into a message body can be based on accurate data from the Synergy database reducing the possibility of incorrect information is entered in the message. This can be done by linking an additional data table to a message template.



Once the additional data is linked to the message template, it will be used during the message creation to accept information to be replaced in the message body. You can optionally specify whether Synergy should validate the additional data table against the entity that the message is created from by using the “Validate first” check box. If you turn on validation, Synergy will check and ensure that the additional data is linked to matter (or client if the message is created from a client) type before allowing the user to fill in the details. If you turn the validation off, the additional data form will be displayed regardless of the appropriateness. In cases where additional data is appropriate for a matter, using this to create a message from client will be inappropriate. So we encourage you always to turn the validation on unless you have a very very good reason for turning this off.

**Template Properties**

External ID:

Description:

Template type: **Message template** ☐ Used for EMail/Fax client

Recipients: **General** | Auditors | Other

Classification: **General** | Clients | Tasks | Security groups | Security users | Departments

Reference no.:

Subject:

Message body:

Replacement symbols:  ☒ **Validate first**

Follow-up option: **W/A**

Follow-up category:

Follow-up type:

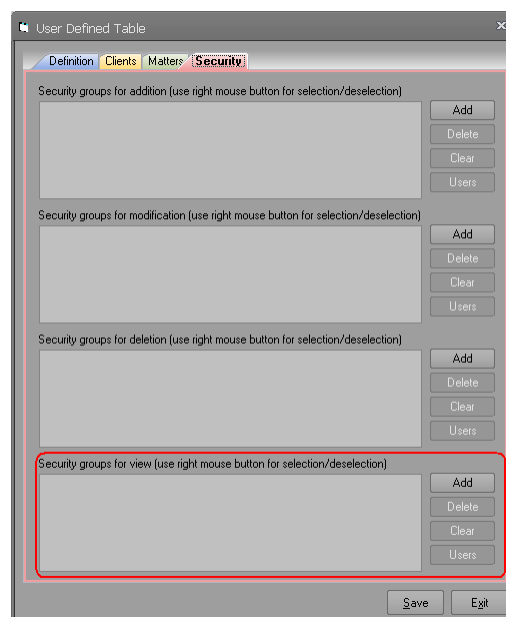
**Save** **Exit**

Please note that only the active additional data columns will be displayed for the data capture. When creating a message, Synergy will also check the exiting additional data of the client/matter. If it determines that there is exactly one additional data row already captured for the selected entity (client/matter), then that additional data row will be displayed so that user can use already captured information rather than having to type everything from the start.

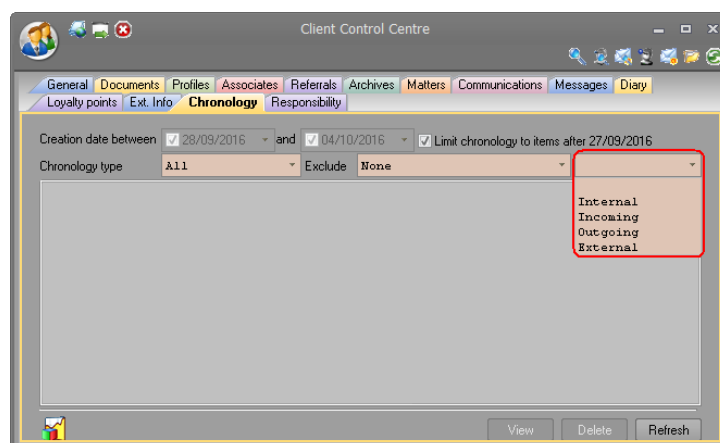
The screenshot shows the 'Matter Control Centre' window. At the top is a navigation bar with icons for home, help, and exit, followed by a set of tabs: Archives, Ext. clients, Unbilled time, Disbursements, Invoices, Chronology, History, Timesheets, Reserve, General, Tasks, Documents, Additional data (highlighted), Rel. clients, Rel. matters, Profiles, Communications, Messages, Follow-ups, and Diary. Below the tabs is a section titled 'Additional data relating directly to this matter...' containing a dropdown menu for 'Data type' and two buttons: 'Refresh' and 'Run report'. Underneath is a table with columns: Record Type, Weekly Ent..., Builder Policy..., Ris..., Ris..., Agent No., Agent Name, and Legal E... The first row of the table has a red rectangular highlight around its first cell. At the bottom of the window is a toolbar with buttons: History, Move, Link, Cgpy, Create, Update, View, Add, Edit, and Delete.

Please note that when existing additional data rows are detected, the user must have view access before the data is displayed. Please ensure that users that will be using replacement symbols for messages do have view access to the additional data table used as replacement symbols.

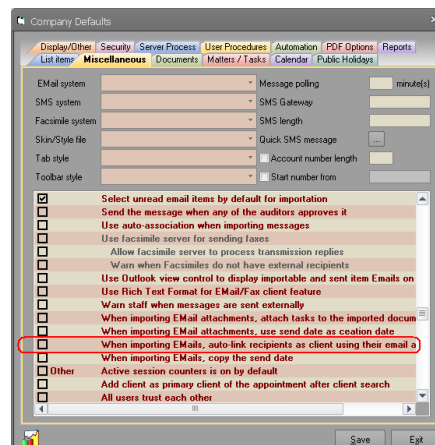
If you are creating an additional data table just for the purpose of using it in message body replacement, and you do not want user to accidentally create additional data based on it, we suggest creating a dummy matter (or client) type, create all the additional data tables that you need and link them to dummy matter (or client) type. Once this is done, you can inactivate the matter (or client) type so that Synergy will not use it anywhere. Activation and inactivate of the dummy matter (or client) type will be required anytime you will need to add new additional data table for message replacement symbol.



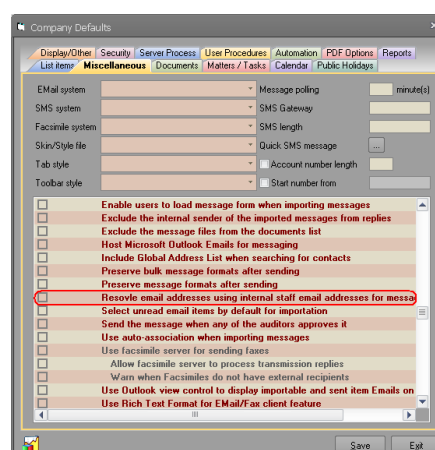
- 5) We have added an extra filter to the chronology tab of Client Control Centre, Matter Control Centre, and Task edit form. This extra filter will allow filtering by direction. Please note that direction is only relevant to dispatched items, documents, communications and messages.



- 6) When importing messages, Synergy only checks the sender of the message and links the clients with matching email address to the list of clients. We have added a new setting in Company Defaults called, “When importing EMail, auto-link recipients as client using their email address”. When this setting is turned on, when importing messages, each recipient’s (Main, CC and BCC) email address will be checked against the clients and clients with matching email address will be linked as client to the email. Please note that when multiple clients have the same email address, a limited number of them will be linked (client name will be used for sorting purpose).

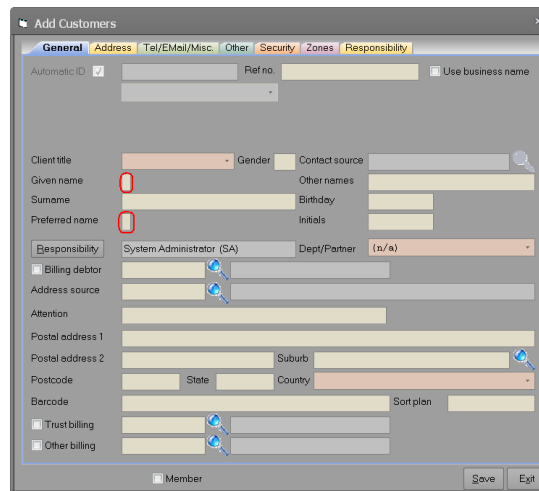


- 7) When importing messages into Synergy, they will be marked as incoming emails. In some cases, despite us discouraging this, users send messages from outlook and later on they import those messages into Synergy and then file them properly. In such cases, an incoming direction for email is not correct. From this version, we have changed how Synergy sets the direction for imported messages. When messages are imported into Synergy, the sender’s email address will be checked against the logged user’s email address and when they match, the direction of the imported message will be set to outgoing. If they do not match, then the direction will be set as incoming as before. The direction will be even more accurate if the setting to check the recipient for internal user is turned on. In this case, if all the recipients are internal users, then the direction will be set to internal because an internal user has sent message to a bunch of other internal users from outlook.

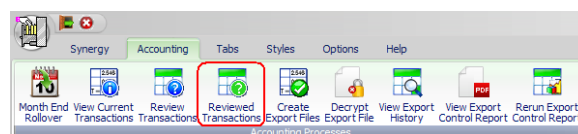


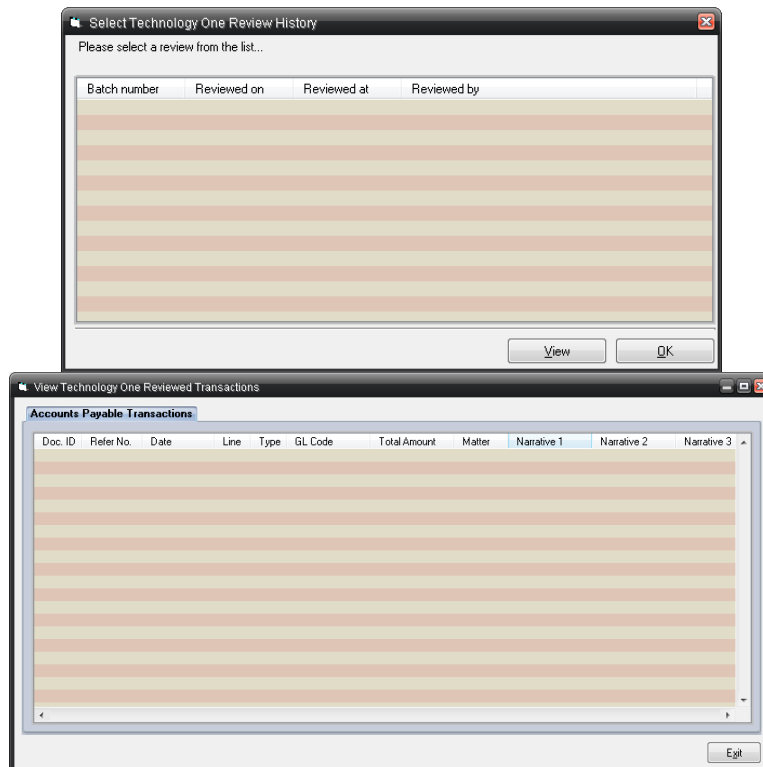


- 8) In many places, we use our own user control to display text, date, numbers etc. In these places, when users were changing DPI setting, our user control were not displaying correctly in some places as indicated in the following image. In this version, we have fixed our user control and have made it DPI aware.

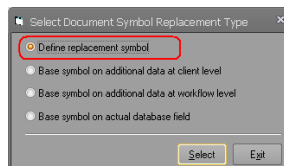


- 9) This item was removed.
- 10) We have fixed a bug in setting matter budgets. When users were accessing some of the popup menus from the disbursement or time budget tabs, the budget amounts were not calculating correctly in the matter budget table. This is fixed now.
- 11) We have also fixed our costing report that gets displayed from MCC. It was not displaying the budgeted amount for disbursement types that did not have any disbursement in the system. Please ensure that all reports are copied to your Synergy system directory from distribution media.
- 12) Users of our Software Development Kit can now search for a user's favourite clients using the client search class. The Software Development Kit test application has been amended to include a favourite button.
- 13) Added more properties to the client search result class in our Software Development Kit. Developers can now access phone numbers, postal and residential addresses and many more. These properties will only be available if the logged user had view access to the client record.
- 14) Added a button to the accounting ribbon tab to allow those that can review Technology One transaction to view already reviewed transactions. This would be useful when the export of these transactions is done later and the reviewer may want to see what transactions are there for export process. Currently, this cannot be achieved in any way. If there are multiple reviews done, the user will have to select a review before the transactions are displayed.

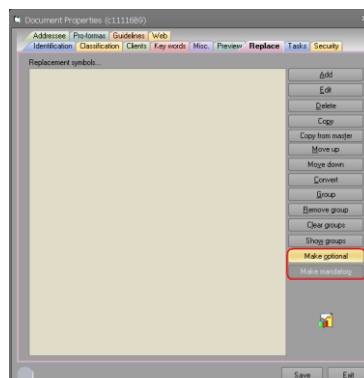




- 15) Fixed a replacement symbol related bug in document properties. Copy button was only meant to be available when the selected symbol was defined as literal. It was also not checking the maximum limit for number of symbols.

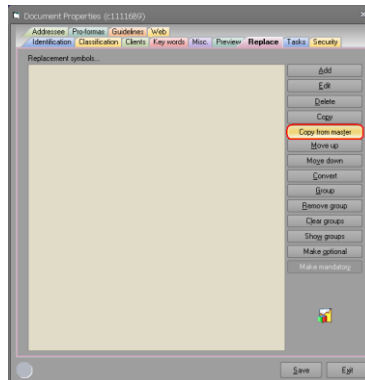


- 16) We have added two new buttons that allows users to set the mandatory setting for highlighted or all selected symbols on document properties form.

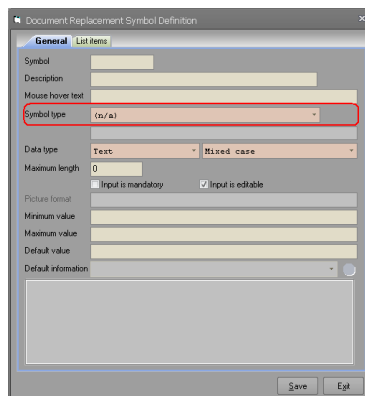


Multi-selection of list entries was only available for grouping of the replacement symbols. Because of this change, we had to always allow list entries to be multi-selected. Please note that the grouping process will automatically remove invalid selected entries from the process.

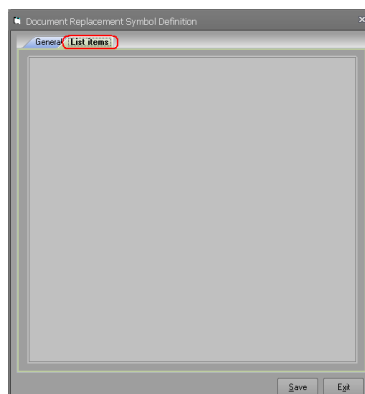
- 17) We have added a new button that allows users to copy replacement symbols from other master documents. Please note that when selecting a master document, only those masters with matching creation context will be available for selection.



- 18) The symbol replacement edit form was removing the grouping in some cases. We have changed this so that grouping will only be reset if the replacement symbol type is changed



- 19) We have fixed a bug in list items tab of the document replacement symbols. When users were editing a document replacement symbol with entries in the list items, these entries were not getting displayed in the list. As a consequence, if they clicked the save button, they were losing all these list items. We have fixed this bug on this version. Please note that this bug was only introduced in V11.00.07\* and is not present in previous versions.

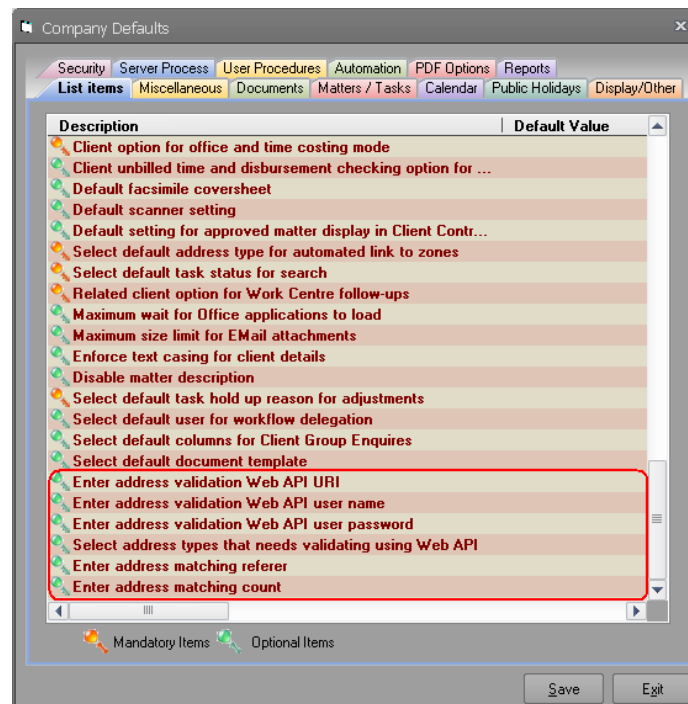




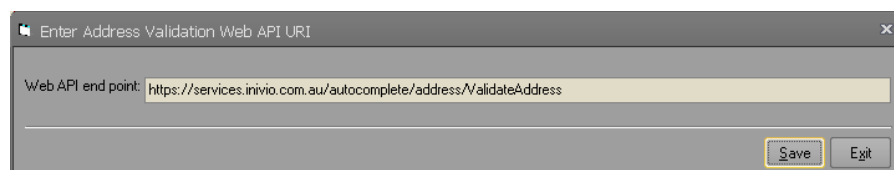
### *Modification as at release 11.00.07b*

- 1) Synergy now allows users to integrate with Veda/Inivio Web API address validation. To do this, our customers can subscribe to their address validation service and once this is done, the system can be configured as follows.

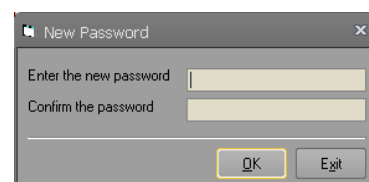
System Administrators can go to the company defaults. They will see 4 new configuration settings as follows:



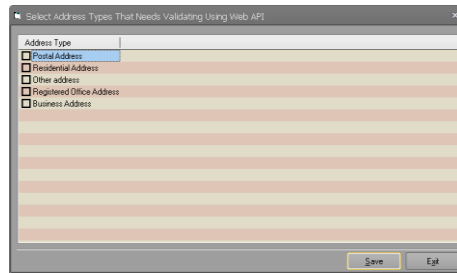
First the Web API end point will need to be configured. To do this, double click on the Web API URI entry. This should display the following form.



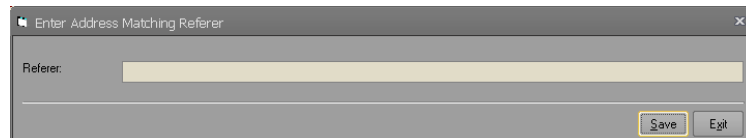
The form will display the default end point for the address validation. Only change this URI if Veda/Inivio notified you that the end point is changed. Next, you need to configure the user name and password. To do this, please double click the relevant entries and enter your correct credentials. Please note that the password cannot be longer than 19 characters.



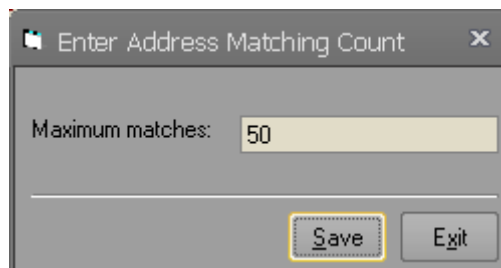
The next required configuration is to specify which client address types must be validated against the Veda/Inivio address validation Web API.



Administrators will also need to configure the address matching setting. This will be used when the search button on an address is clicked. There are two setting for this. The first is called referrer. Veda/Inivio address matching API requires that the referrer in the http header to be set to a value that is configured in their portal. Administrators will need to enter the referrer name that they have configured in their Veda/Inivio portal here.

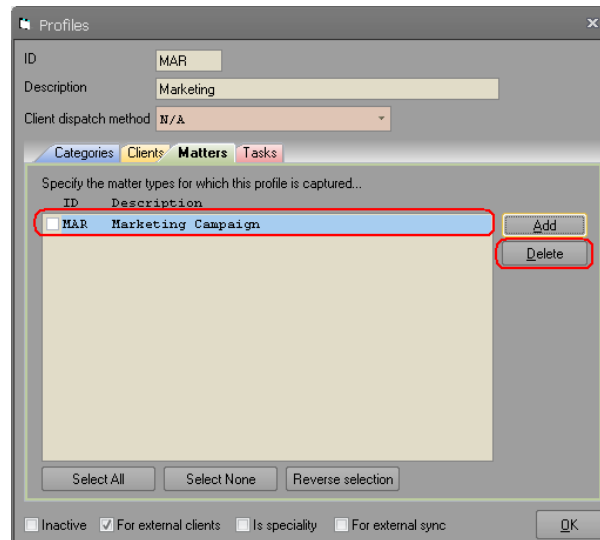


And finally, the number of matched addresses must be set as well. This can be a number between 50 and 999. Please note that the more matches required, the longer it will take to return the result. We suggest leaving this at the minimum number.

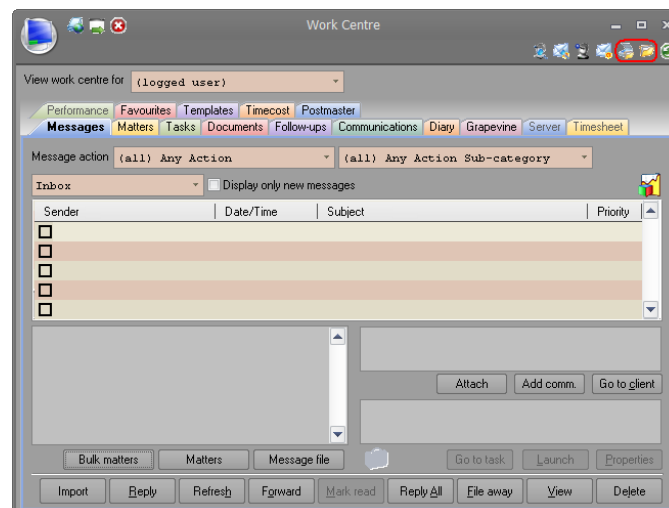


**Modification as at release 11.00.07a**

- 1) We have fixed a bug in the profile configuration form. When matter types were being removed, Synergy was deleting all matter profiles for all matter types rather than the selected matter type in the profile form. This has been fixed.

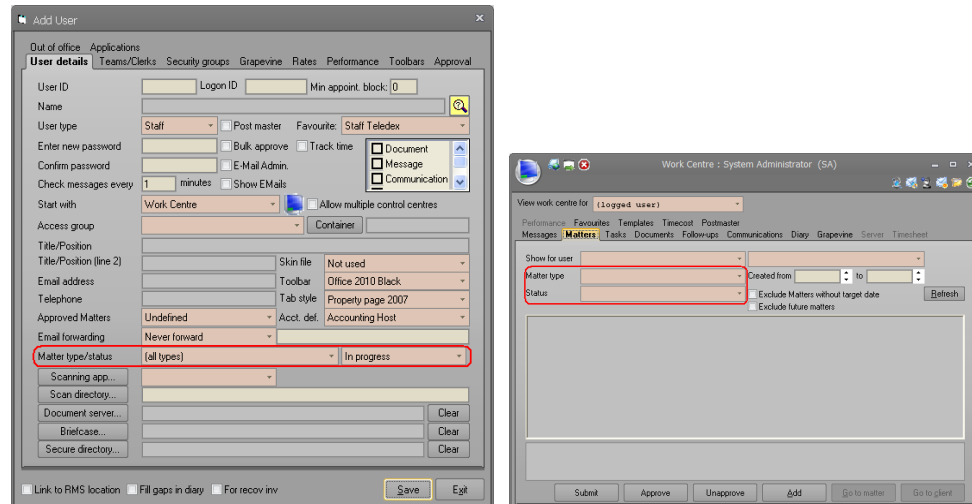


- 2) The matter creation and scanning button from the Work Centre, Matter Control Centre and Client Control Centre was not working. We have fixed this on this release. Please note that the V11.00.07a package that was issued 12<sup>th</sup> of August 2016 does not contain this fix. The fix is only included in V11.00.07a package issued on 16<sup>th</sup> of October 2016. Please use <http://www.stsynergy.com/media/stsynergyreleases.asp> to download and install the new V11.00.07a package.

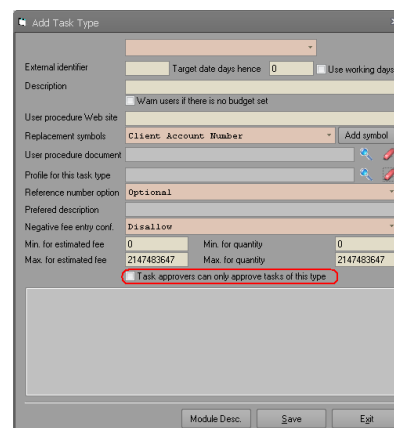


### **Modification as at release 11.00.07**

- 1) Added two options to user profile for customisation of data displayed in the matters tab of the Workcentre. The matter type will also be used in setting up the task tab of the Workcentre.



- 2) We fixed a bug in timesheet entries. For communication, the timesheet description was not being updated for un-costed entries. This has been fixed in this version.
- 3) A number of our customers have asked to have the ability to isolate a single task in a matter and only allow the task approver to approve that task. With current available settings, this was not possible if the setting like extending matter approvers to approve tasks. These customers were also asking if it is possible to stop the bulk approval of the matter if such tasks were still active and unapproved. We have added a new setting to task type as follows:



With this setting in place, if there is an active task of this type on a matter, only the approver specified in the task will be able to approve the task and no one will be able to bulk approve the matter unless this task is approved. Imagine you are selling Ferraris and you have sold one but during the delivery process, the buyer requests to cancel the purchase. You may need this cancellation request to be dealt with by a manager or some person higher up the



hierarchy rather than the sales person or the person that is processing the delivery. This setting will help greatly in achieving this requirement.

- 4) When a trusted user is selected in the Workcenter, the trusted user cannot open documents and check them out even if s/he has security clearance to do so from the documents tab of this form. We have allowed those that have security clearance to launch the document the ability to launch them from the documents tab of the Workcenter rather than having to go somewhere else to look at the document.
- 5) We have added ability to extract data from related clients of the matter for additional data and document replacement symbols. When selecting this option, you can optionally search for a client type and specify that only related clients' data of that type of client should be allowed to be selected.

User defined item

ID:  ☒ Display in list view ☐ Prevent updates

Description:

Select data from: (n/a)

Data type: Sales Territory, Country, State, Client External Information, Users, Active Users, Inactive Users, Related Client of Workflow

Maximum length:

Picture format: Related Client of Workflow

Default value:

Minimum value:

Maximum value:

Mouse hover text:

☒ Has list

List value: Inactive

Default information:

Save Exit

Document Replacement Symbol Definition

General List items

Symbol:

Description:

Mouse hover text:

Symbol type: (n/a)

Data type: Related Workflow, Indirect Association, Other Tasks, Client External Information, Users, Active Users, Inactive Users, Related Client of Workflow

Maximum length:

Picture format: Related Client of Workflow

Minimum value:

Maximum value:

Default value:

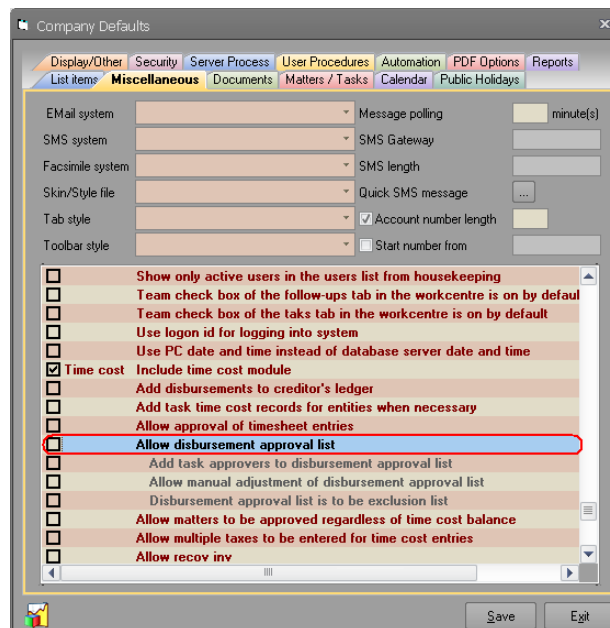
Default information:

Save Exit

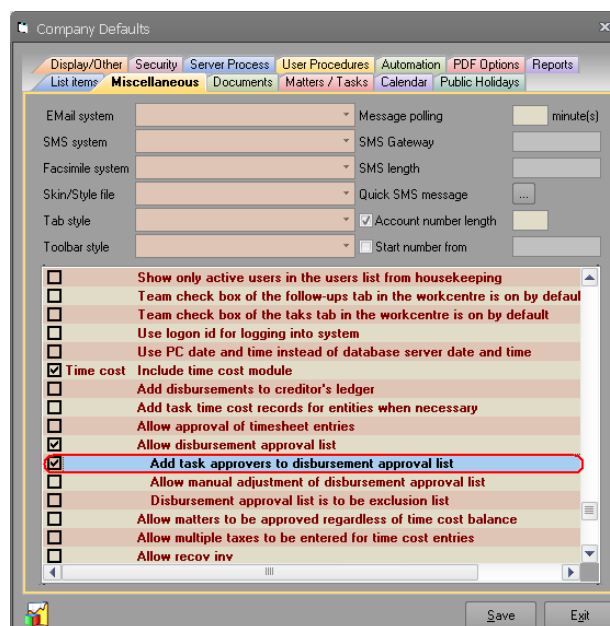
### *Modification as at release 11.00.06*

- 1) We have added a new feature that allows sites to allow/disallow a list of staff from approving disbursements at the matter level. This feature can be set up as follows.

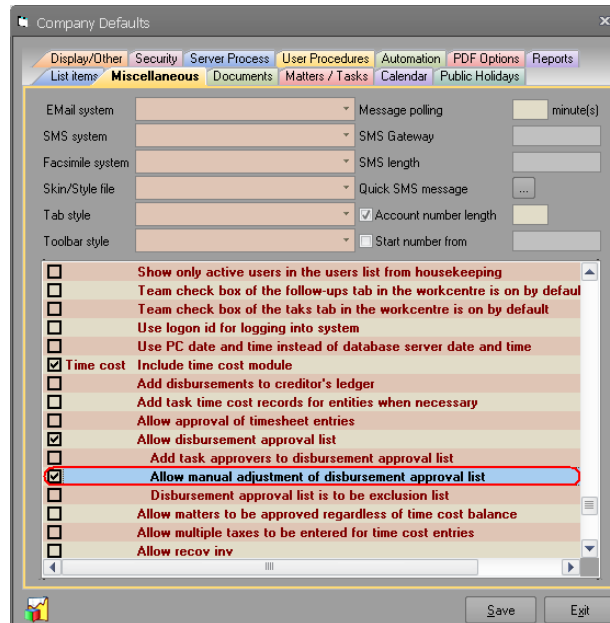
You can turn this feature on/off from the time cost section of the company default using the highlighted option.



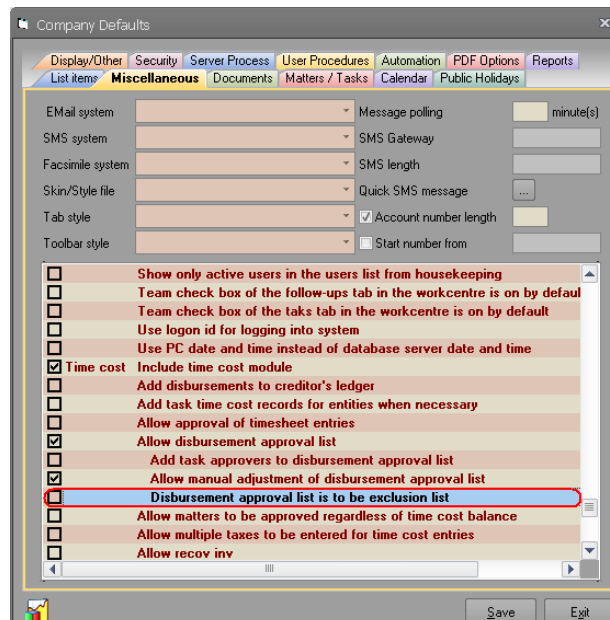
Once this setting is turned on, you can specify how the staff list can be built. You can set the system to automatically add the task approvers to this list. This can be done by turning on the following option as highlighted below.



By doing this, task approvers will automatically be added to this list. Please note that teams are not processed as part of this feature and hence they will never be added to this list. Please also note that by setting a team as the approver, this feature will not add the members of the team to this list. One can also allow this list to be manipulated manually. This can be achieved by turning on the following option as highlighted in the image below.



When either of these options are turned on, one can specify whether this list to be treated as an exclusion or inclusion list using the following option as highlighted in the image below.



The list by default is considered as inclusion list, that is, only staff listed here are the ones that can approve any disbursement on a matter. You can turn this

list to exclusion list by turning on the above setting. In this case, staff listed here will not allowed to approve any disbursements on a matter.

As indicated above, if sites would like to control the staff populated in this list, they can turn “Allow manual adjustment of disbursement approval list” setting. Once this is done, you can specify a security group at the matter type level which indicates who is allowed to manipulate this list for that matters of that type.

The screenshot shows the 'Edit Matter Category' dialog box with the 'Security groups' tab selected. The tab contains five rows of settings, each with a label, a dropdown menu, and a small icon. The 'Secure approval list to' row is highlighted with a red rectangle. All dropdown menus are currently set to '(Not Secured)'. At the bottom of the dialog, there are buttons for 'Inactive', 'Module Desc.', 'Save', and 'Exit'.

Label	Value
Secure addition to	(Not Secured)
Secure modification to	(Not Secured)
Secure deletion to	(Not Secured)
Secure bulk approval	(Not Secured)
Secure approval list to	(Not Secured)

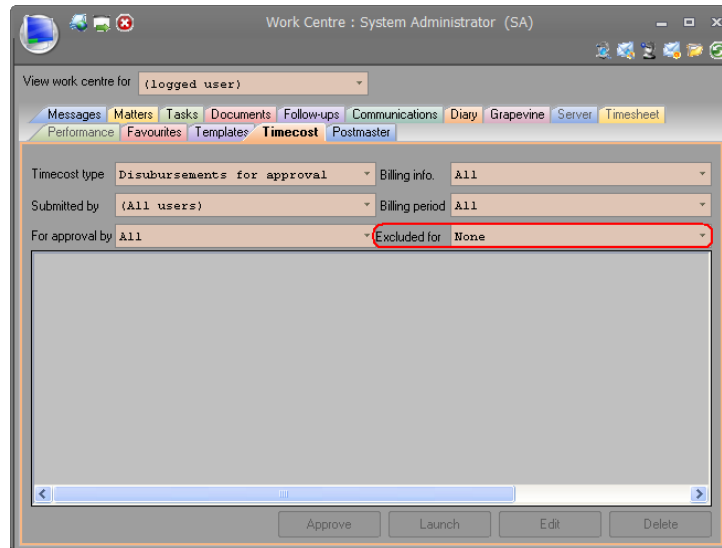
When this setting is turned on, in the matter edit form, users will see a new tab called “Disb. Approval”. This tab will list all the users that are currently in the disbursement approval list. Users in this security group can manipulate this list as they wish.

The screenshot shows the 'Edit Matter: 1026302 (In progress)' dialog box with the 'Disb. Approval' tab selected. The tab displays a table with three columns: 'User ID', 'User name', and 'Inactive'. The table is currently empty. At the bottom of the dialog, there are buttons for 'Approve', 'Save', and 'Exit'.

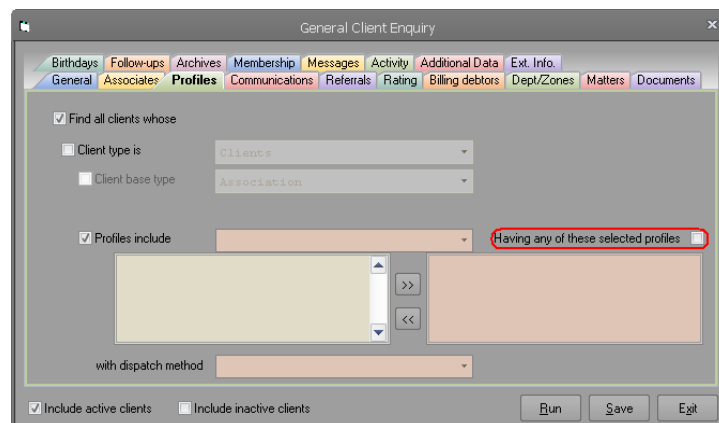
User ID	User name	Inactive
---------	-----------	----------

The disbursement approval process has now been amended to consider users in this list. If the list defined as exclusion list, users in this list will be prevented from approving disbursements even if they all other business rules. If the list is defined as inclusion list, only users in this list can approve disbursement if they pass other business rules.

When the disbursement approval list is defined as exclusion list, the “Disbursements for approval” option will display a new user drop down called “Excluded for”. Selecting a user from this drop down will display all disbursements that selected user is excluded from approving.



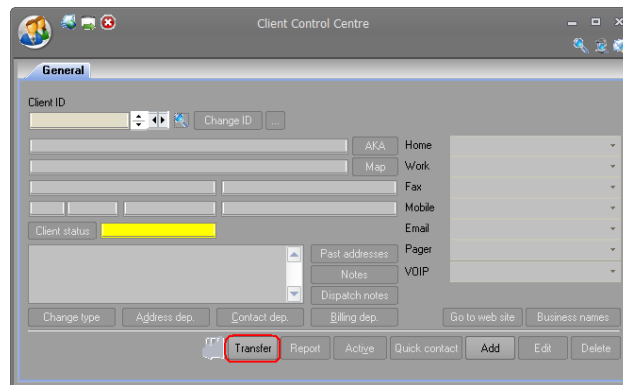
- 2) We have fixed a bug in importing queries. The queries were not being imported in the right sequence.
- 3) We have added a check box to the profiles tab of the Ad-hoc enquiry form. This check box allows users to specify whether they want clients to have all or any of the selected profiles. When this check box is selected, clients that have any of the selected profiles will be included in the result set. With this check box, the client must have all the selected profiles before they are included in the result set.



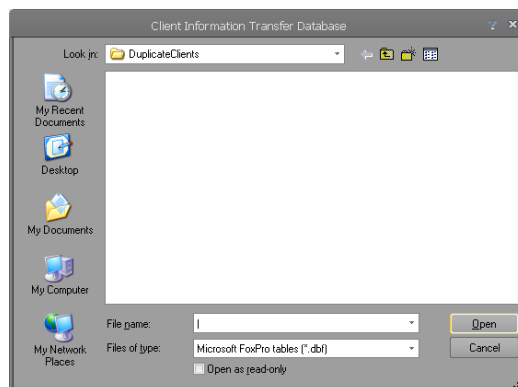
- 4) We have enabled the transfer button to perform bulk transfer of data for multiple clients in one go. The bulk client transfer is only available when there is no client selected in Client Control Centre. When a client is selected, the transfer button will behave as before and only transfer data from the selected client to the one specified in the transfer form.

To perform a bulk client transfer for multiple clients in one go, follow these steps:

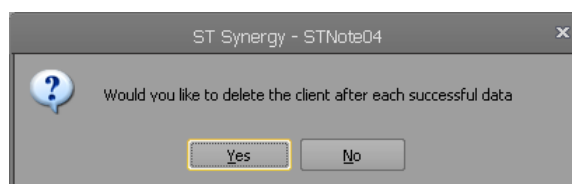
- Create a database table with two columns called FromClient and ToClient. This database can be a simple excel file with two columns, a DBF table with two fields, tab delimited text file (txt) with two columns, or a Microsoft Access MDB table with two fields. Populate this table with the primary key (UniqueID) from the ZZCLIENT table for the client that you want to transfer from (FromClient) and for the client that you want to transfer to (ToClient).
- Clear the Client Control Centre first by deleting the content of the client identifier field and then tabbing out of the text box and then click the transfer button.



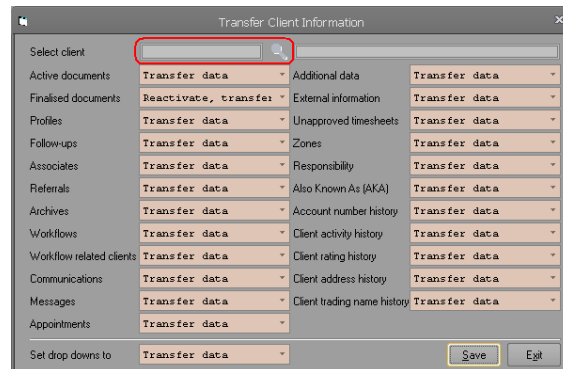
- You should get a file explorer window where you can navigate to your database. Select your file and then click open.



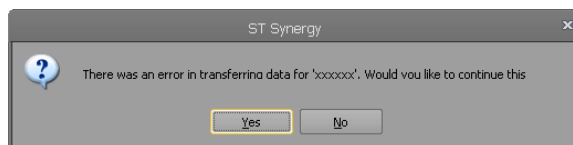
- Usually data transfer is done because you have duplicated clients and you may want to consolidate them and then delete one. To provide you the ability to delete the client after the successful transfer, Synergy will ask you whether you want the clients to be deleted after the successful transfer.



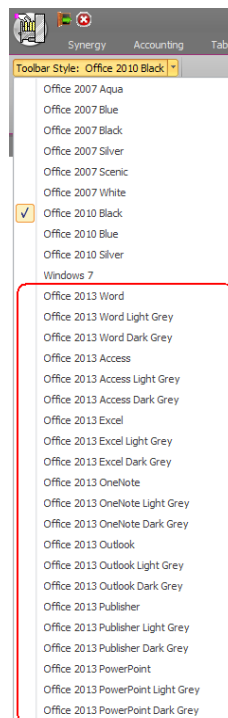
- Once you have decided whether you want the clients to be deleted or not, the usual client data transfer form will be displayed. Please note that the client selection controls will be disabled in this case. Select the options that you need and then click the save button. This would start the process and transfer data from “FromClient” to “ToClient” specified in your database. As usual, you will be notified if there were any errors or data could not be transferred.



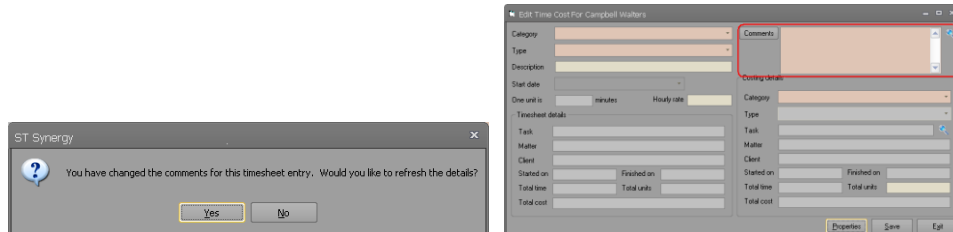
- The first time that data cannot be transferred or an error is happened, you will be given the option of stopping the process or continuing on.



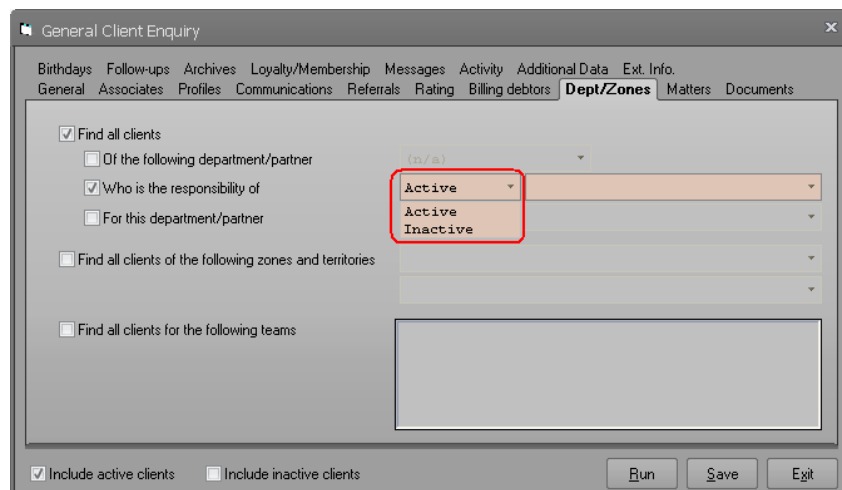
## 5) Added more ribbon themes to the application.



- 6) Sometime users access properties of a timesheet entity from the timesheet form and change the comments. When the properties form is saved and closed the comment field of the timesheet entry will not be correct. Synergy now detects whether the comments has changed and if so, it will ask the user whether s/he wants the comments to be refreshed.



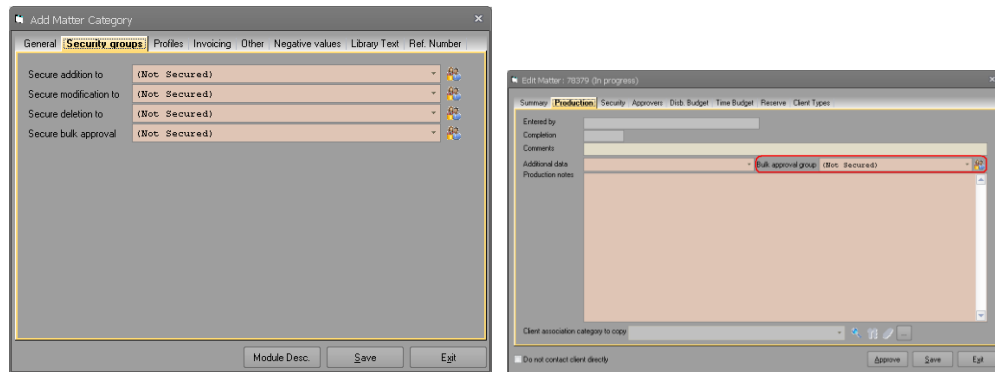
- 7) We have added an activity dropdown to the Enquiry form. This will allow users to filter the listed user in the user drop down.



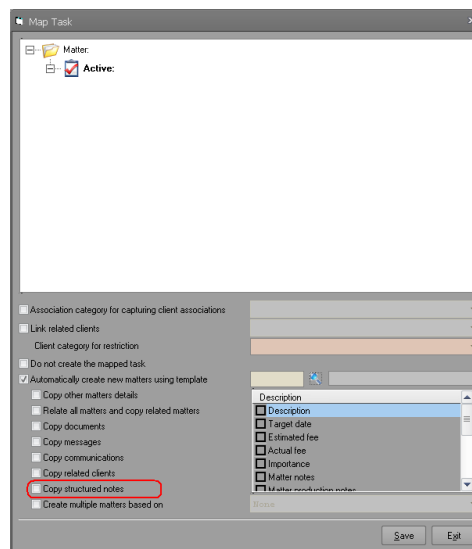


**Modification as at release 11.00.05**

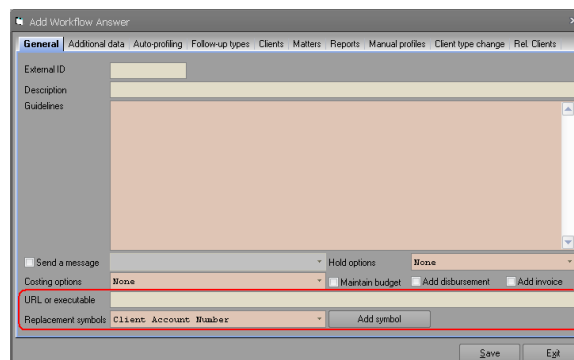
- 1) Added bulk approval security group for matter types and master matters. With these security groups in place, just providing bulk approval ability at the user profile level is not enough for bulk approving a matter. When these groups are present, it is checked in hierarchical manner before bulk approval is granted. Master matter security group takes priority over matter type security group which in turn takes priority over the bulk approval flag for user profile.



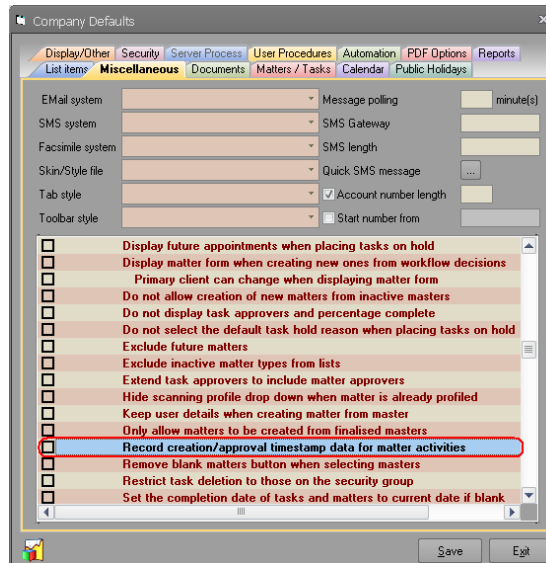
- 2) Allowed structured notes to be copied from a decision task.



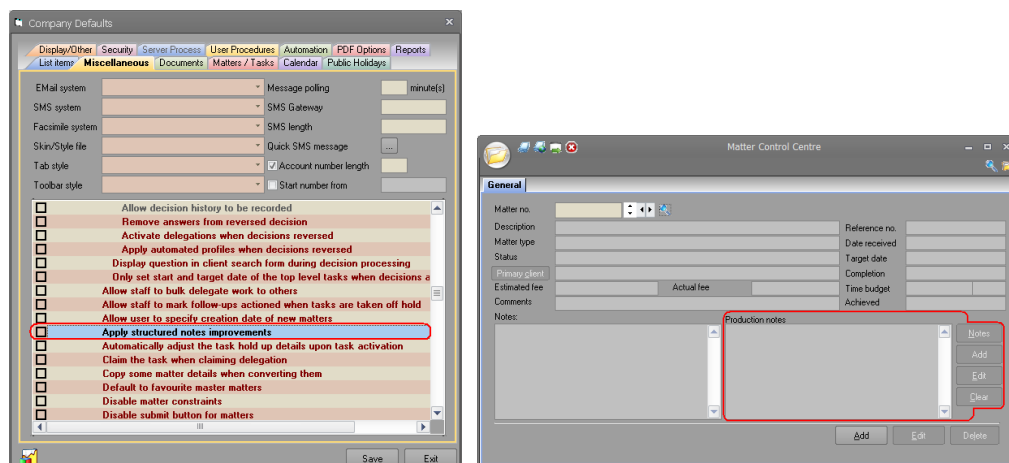
- 3) Added ability to display a URL or run an executable from a decision task.



- 4) We have added a new table that logs the date and time of certain matter related activities. These activities include creation, activation, claiming and approval. The time will have a granularity of milliseconds (HH:MM:SS.nnn). Please note that the accuracy of the time component is Operating Systems dependent. Some Operating systems may have timer events fired at 10 milliseconds intervals and others may fire these at 50 milliseconds intervals. Also depending on OS queue, these events may not be fired at these intervals. The only. Therefore, it is entirely possible for two records to be written into Synergy table with an identical time component if they were processed one after the other.

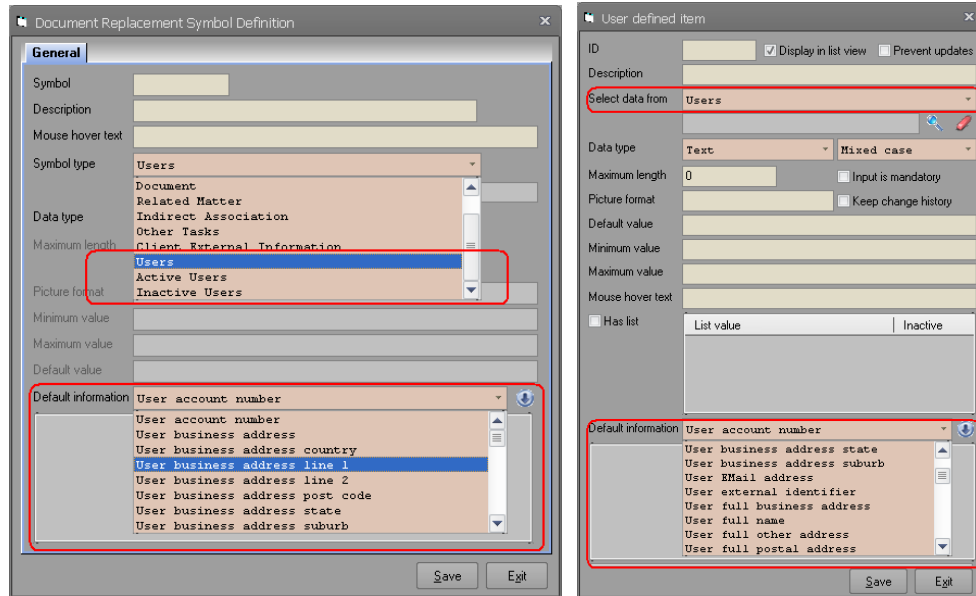


- 5) Allowed the functionality of the structured notes buttons to be changed to improve the user friendliness of the system. With this setting turned on, all structured notes will be concatenated to the production notes and displayed in the production notes box. There are also some changes to the notes and add button.

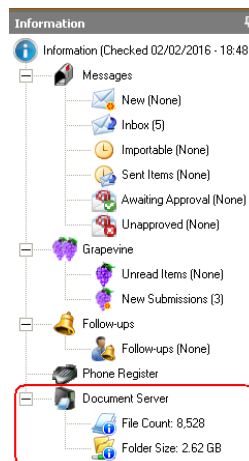


- 6) We have added ability to select user data for the additional data and document replacement symbols. Some user related information as well as client related information can be extracted and filled in. This type of additional data like

other allows grouping of similar additional data columns into a group in order to fill all of the required data by selecting only one user.



- 7) We have noticed that many of our customers forget to check their document repository and hence, tens of thousands of files gets added a single document server folder. While this has no impact on Synergy's operations, when network administrators look at these folders, they will have to wait quite a while for explorer to fill out the information. As a reminder, we have added a new node to the information side bar displaying the number of files and size of the current document server folder. This will provide enough information to the users and hopefully they will remember to maintain their document server folders promptly. Please note that counting files and determining the size of the document server folder could take a while. To avoid blocking Synergy, an external process will be responsible for doing this task. This node will be invisible while the external application is performing this task. This process is only done once after a user logs in to a company or when a user explicitly requests the information bar to be refreshed by using the refresh popup menu item.



- 8) We have added ability to store a reason for matter conversion. When entering reason, users can use library text to pick pre-defined reasons.
- 9) We have noticed that many of our customers forget to upgrade the product to a new version when they are released. Please note that the Company's support policy states that any support of a product version expires 18 months after its release or 6 months after release of a new version whichever occurs earlier. Support of out dated versions is entirely at the discretion of ST Synergy. Consequently, should you decide not to upgrade to a new version, 6 month after a new release, ST Synergy may request you to upgrade your product before it addresses any issues. In order to assist our customers with this, we have added a new progress bar to the application status bar to indicate when version support is likely to expire. Synergy application will check the company's web site to ensure that customers are made aware of new versions as soon as they are released. To avoid blocking application, an external process will be responsible for doing this task. A red border around the progress bar will signify that support for your version for the application has expired.



**Modification as at release 11.00.04**

- 1) Added ability to enforce reference number for task types. This should allow sites that require mandatory task reference numbers to implement this. There are three possible choices for reference numbers, optional, optional with warning and mandatory. The default for this version is set to optional to preserve exiting behaviour. This setting will be checked within the task edit form as well as during the approval. A description can be stored to describe the data that a site is storing in this field. Please note that description can only be entered when the reference number is optional with warning or mandatory.

This feature has been added to our Software Development Kit library as well. As a result, a new event will be raised from the workflow class object for processing this requirement.

The image shows two side-by-side screenshots of the 'Add Task Type' dialog box. The left screenshot shows the 'Reference number option' dropdown set to 'Optional'. The right screenshot shows it set to 'Optional with warning'. Both screenshots have a red box highlighting the 'Reference number option' dropdown and the 'Preferred description' text field below it.

- 2) Added ability to enforce reference number for matter types. This should allow sites that require mandatory matter reference numbers to implement this. There are three possible choices for reference numbers, optional, optional with warning and mandatory. The default for this version is set to optional to preserve exiting behaviour. This setting will be checked within the matter edit form as well as during the approval. A description can be stored to describe the data that a site is storing in this field. Please note that description can only be entered when the reference number is optional with warning or mandatory.

This feature has been added to our Software Development Kit library as well. As a result, a new event will be raised from the workflow class object for processing this requirement.

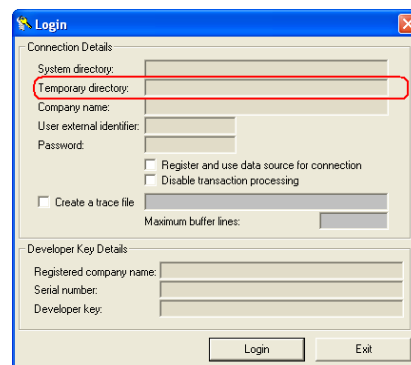
The image shows two side-by-side screenshots of the 'Add Matter Category' dialog box. The left screenshot shows the 'Reference number option' dropdown set to 'Optional'. The right screenshot shows it set to 'Optional with warning'. Both screenshots have a red box highlighting the 'Reference number option' dropdown and the 'Preferred description' text field below it.

- 3) We have added ability to create and maintain disbursements, timesheet entries, time cost summary records, and invoices to our Software Development Kit library. The Software Development Kit test application has been amended to include demonstration of these features.
- 4) In our office and time costing system, actual time spent by a user on a specific task was stored in minutes. We have changed this and Synergy now stores the actual and estimated durations in seconds rather than minutes. All system reports have been amended to consider this change. However, if you have developed any reports based on the time cost tables “ZZTMECST” and “ZZTMESUM”, please review these reports and consider the change in the time cost granularity.

The screenshot shows the 'Add Time Cost' dialog box. The top section contains fields for 'Category', 'Type', 'Description', 'Start date' (Thursday, 28 May 2015), 'Start time' (18:49:14), 'One unit is' (0 minute), and 'Hourly rate' (\$0.00). The bottom section, titled 'Costing details', contains fields for 'Category', 'Type', 'Task', 'Matter', 'Client', 'Started on' (28/05/2015 18:49:14), 'Finished on' (28/05/2015 18:49:14), 'Total time' (00:00:00), 'Total units' (0.00), and 'Total cost' (\$0.00). Red boxes highlight the 'Start time', 'Started on', 'Finished on', and 'Total time' fields. Buttons for 'Properties', 'Save', and 'Exit' are at the bottom.

- 5) In many cases, processes in our Software Development Kit library may require user input. The user inputs may be required in the middle of an operation. An example of such case is task approval process where the user may have to go through a number of steps before a task is approved. Given that our Software Development Kit library uses transactions, in cases where user input is required, these transactions may lock other users of the system including those using the Synergy application. To avoid these, we have allowed developers to indicate whether Software Development Kit should or should not use transaction processing. Please note that when creating workflows in cached mode, transactions will always be used as this is a bulk process. The two method calls, DisableTransactionProcessing and EnableTransactionProcessing allows developers to turn the transaction processing on and off. These methods can only called before the Connect method of the database class is invoked. After a call to Connect, calling these methods will generate an error and will not have any affect in transaction processing. TransactionProcessingDisabled and TransactionProcessingEnabled properties allow developers to check the status of the transaction handling within the current library session.

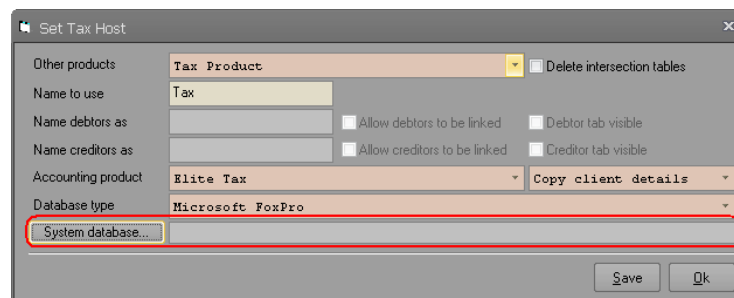
- 6) In previous versions of the Software Development Kit library, when a temporary folder was passed, the library would automatically assume that the developer would be using the cached method for matter creation. Consequently, it will create the required temporary database during the Connect method call. However, a number of other new processes that we have added to the library may also require access to a temporary folder (e.g. document launching etc.). To avoid the unnecessary overheads of creating the temporary database for other cases where temporary folder is needed, the creation of temporary database is done when the first process requires it. This should be transparent to the developers and hence will not require any changes to the code. This release note is simply put here as information for all the developers using our Software Development Kit library.



- 7) In office and time costing reports, all time cost entries attached to host client are usually excluded implicitly or explicitly when requested. In some cases where a company is sold to a new owner, the host company will change. However, the time cost reports will not be right if the entries attached to the old host client is included in these reports. We are now keeping track of host client changes in a table and all entries in the host client table is now excluded from these reports implicitly or explicitly when requested. The only chance to remove a host client from the table is when administrators change the host client. Other than that, there is no other interface for manipulating this table. Please note that client list have been removed from actual fee time cost report.

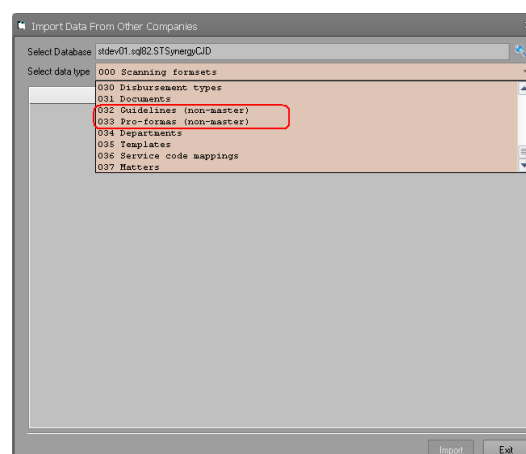
A screenshot of a dialog box titled 'Add Time Cost For John Athans'. It has a title bar with standard window controls. The dialog is divided into several sections. The top section has fields for 'Category', 'Type', 'Description', 'Start date' (with a date picker showing '10/25/07'), 'One unit is' (with a unit selector), and 'Hourly rate'. Below this is a 'Comments' section with a text area. The 'Costing details' section at the bottom has fields for 'Category', 'Type', 'Task', 'Matter', 'Client', 'Started on' (with a date picker showing '05/08/2015 10:25:07'), 'Finished on' (with a date picker showing '05/08/2015 10:25:07'), 'Total time' (with a time picker showing '00:00:00'), 'Total units', and 'Total cost'. At the bottom, there are 'Properties', 'Save', and 'Exit' buttons.

- 8) We have renamed the STSDKAdditionalDataReplacementTypes data type to STSDKReplacementTypes. All stSDKAdditionalDataReplacementType\* values for this type is changed to stSDKReplacementType\*. Please do a find and replace for these data types in your code. We have also renamed indirect appointment data type to stSDKReplacementTypeAppointment.
- 9) From this version onwards, we have decided to store our word template in the Synergy's system directory. Please remove these files from the application installation directory and ensure that you copy these files from the distribution media to your system directory during the upgrade process. In the next release, our installation package will no longer install these files.
- 10) We have fixed a bug in the other products form related to setting Elite as the tax product. It was not saving the SQL Server database details correctly.



- 11) We have added ability to import non-master guidelines and proformas that are attached to all active master matters from the importation form. We have also added importation of GL mapping to this form. Please note that this feature is only available for ST Synergy staff from HK support tab.

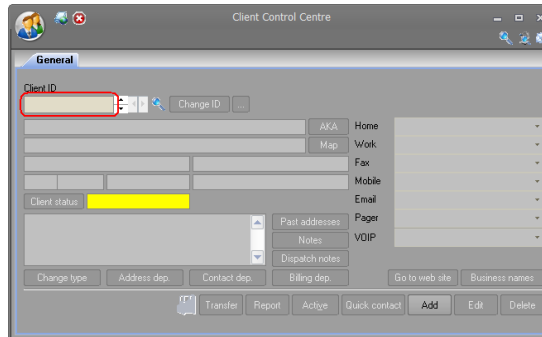
**Please note that features in support tab are strictly for use by ST Synergy Staff and is not for use by clients. Do not use any of the features in the support tab even in the unlikely event that you have miraculously worked out the support password.**



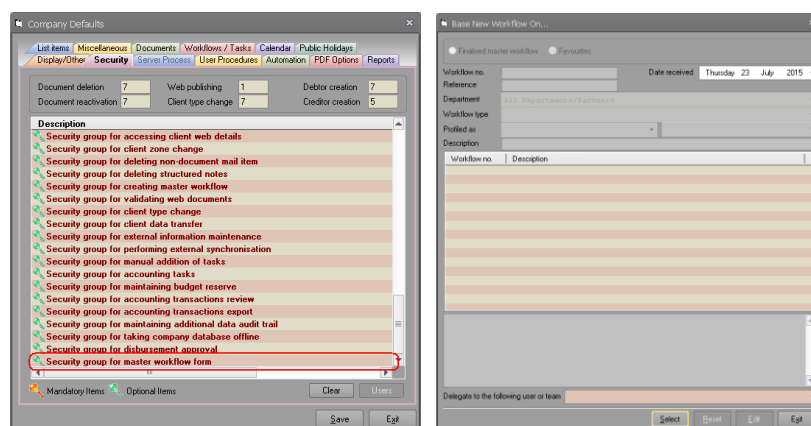
- 12) Users sometimes copy and paste client account numbers from other applications into Synergy. Depending on where the copy is done, some applications may append extra characters to the account number. For example, copying a cell from Excel can append carriage return and linefeed characters to the end of the account number. From this version, we are



removing carriage return, linefeed, tab characters from the account number fields in Synergy user interface. This change is done in most forms that accept client account numbers but not all. For example, the client edit forms use the account number as it is entered in the form. We will gradually work our way in including this change to all of the forms in the future versions.

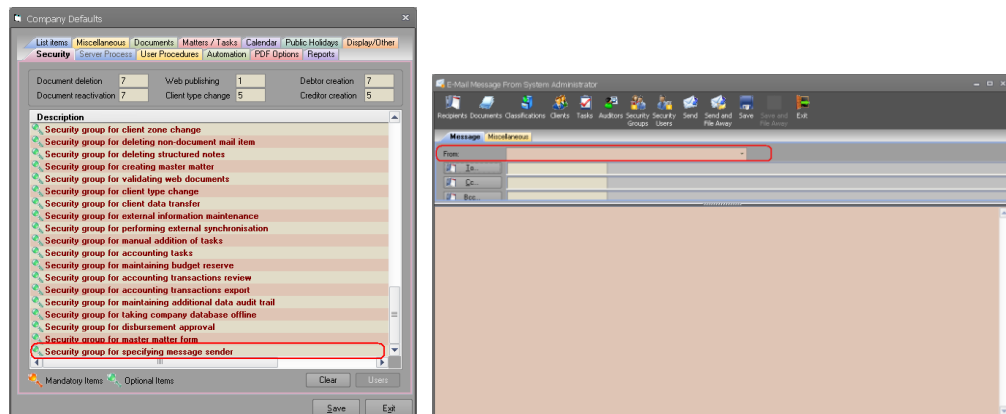


- 13) When a site defaults the radio button to favourites matters, Synergy will display the favourite matters in master matter selection form by default. However, the user still have the option of clicking the other radio buttons and pick other master matters should s/he wish to. Some customers have requested whether these controls can be locked so that people do not create other types of matter by mistake. In this version of Synergy, we have introduced a new security group called “Security group for Master Matter Form” that allows sites to specify which users should be allowed to have full access to controls in the master matter selection form. Please note that this is just a security group for controlling the Synergy user interface and is not by any means controls who can/cannot create use certain master matter for matter creation. Consequently, our Software Development Kit does not implement this security group and can only inform whether the logged user is part of this security group. Please note if this security group is not set, everyone will have full access to the master matter selection controls.

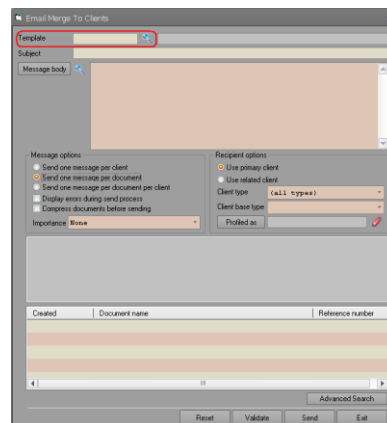


- 14) Synergy allows users to set the sender of a message to a specific mail box. When this feature is turned on from the company defaults, everyone in the organisation can use this feature. Some customers have asked to have the ability to control who can specify the message sender to reduce possible errors. We have added a new security group to allow sites to specify who will

be presented with the sender drop down (from box) in the message edit form. The same security group is used for the email client feature.

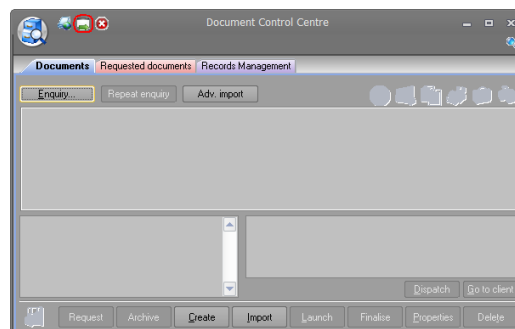


Email client forms have also been amended to ensure that only people within this security group can create and send emails with from email address. Please note that for this feature, message templates with sender email will only be listed in the template selection form if the user is within this security group.

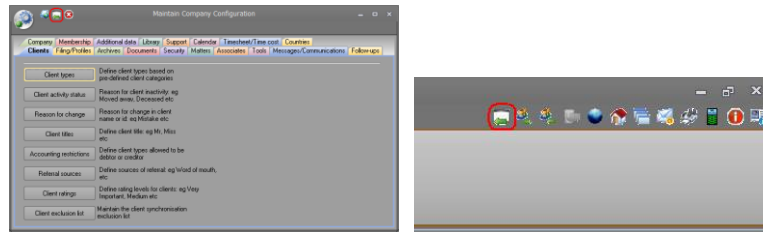


We have also amended email sending method to ensure that those that are not within this security group will not be able to send an email with sender specified. A new error message will be added to the error list if this is the reason for the send failure.

- 15) We have made the document control centre resizable. As you can see from the toolbars, just like any other resizable control centre, you can now detach and float this control centre outside of the Synergy application form.



- 16) We have made all our control centres except the external client control centre floatable on multi-monitor screens. We have also added a new tool bar item to sink all the floated control centres back into the Synergy desktop with one click.

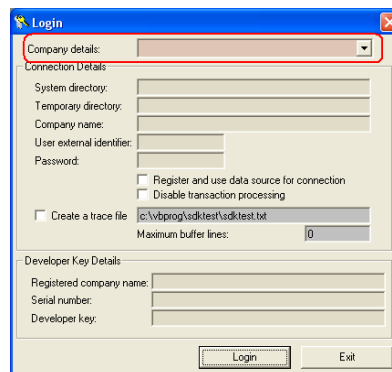


- 17) We have changed all our code to use explicit parameter passing methods rather than relying on VB's default parameter passing mechanism. Please note that as a result of this change, the signature for two methods in our Software Development Kit library have changed. These methods are both part of our clsSTSDKWorkflowItem class. The second parameters for these methods are now explicitly passed by reference. The two methods are:

SetWorkflowItemPrimaryClient  
SetWorkflowItemPrimaryResponsibility

If you are using these methods, please ensure that you code is tested thoroughly before rolling out this version.

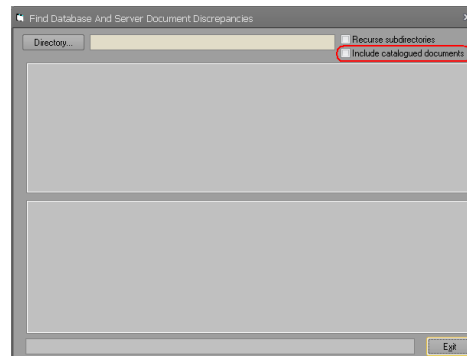
- 18) We have restructured the initialisation file structure of our Software Development Kit test application to more than one set of details to be stored. A new initialisation file section called "Company Profiles" has been added. Under this section, you can assign a profile description (usually name of the database environment that you will be connecting) using ProfileXXX where XXX is a 3 digit number between 001 and 100. Once the profiles have been defined, each section should carry XXX\_ as the first 4 character of the section name where XXX is the relevant 3 digit profile number (e.g. 001\_Connection Details etc). The test application will still be able to read old structured ini files. The list of company profiles will be listed in a drop down and users can select a profile to fill in the details.



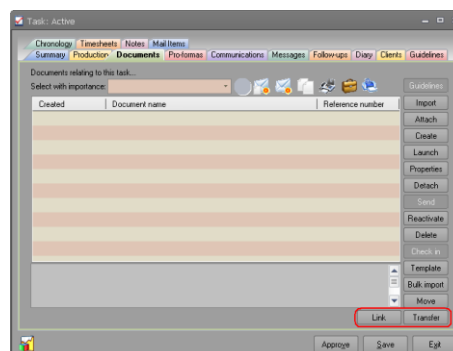
- 19) As you may have noticed, the map button on the Client Control Centre may not work in version 11.00.03 of Synergy. The issue seems to be that Google

has changed their API's and the way they accept parameters. We have changed the way Synergy loads Google maps and managed to work around these changes. We have added a new file called GMFile.sts to our system directory. Please copy this file along with everything else from in the SysDir folder of our distribution media.

- 20) When staff create an invoice in Synergy, the master invoice documents gets listed based on the name of the document. In most cases, the master invoice document relevant to a matter will be linked to the matter as pro-forma document. In these cases, depending on the number of master invoice documents, it could be hard to locate them between all other documents. We have changed Synergy and now showing all those linked documents to the matter at the top of the list. There is a new column in the list that displays which one of the documents are set up as pro-forma document for the matter that invoice is created from.
- 21) When auditing document server repositories, catalogued documents are ignored by the process. We have added a check box that allows administrators to include the catalogued documents in the audit report.

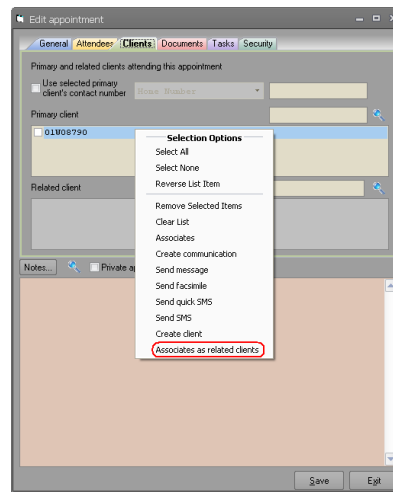


- 22) The "**Link**" button in the documents tab of the task edit form detaches the selected documents and links them to a task in another matter. We have changed the behaviour of this button to reflect the name. From this version onwards, the link button will link the selected documents to a task in another matter and will leave the document attached to edited task. We have added a new button called "**Transfer**" which will do exactly what link button used to do, that is move selected document from the edited task to a task on another matter.



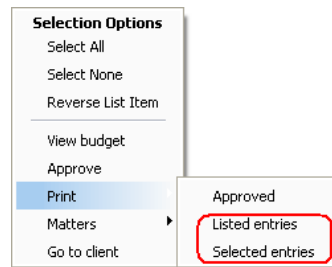
- 23) We have added a new popup menu option to allow users to select associates as related clients for an appointment. This will make it a lot easier to populate

the related clients list from associates of a primary client which was not trivial in previous versions.

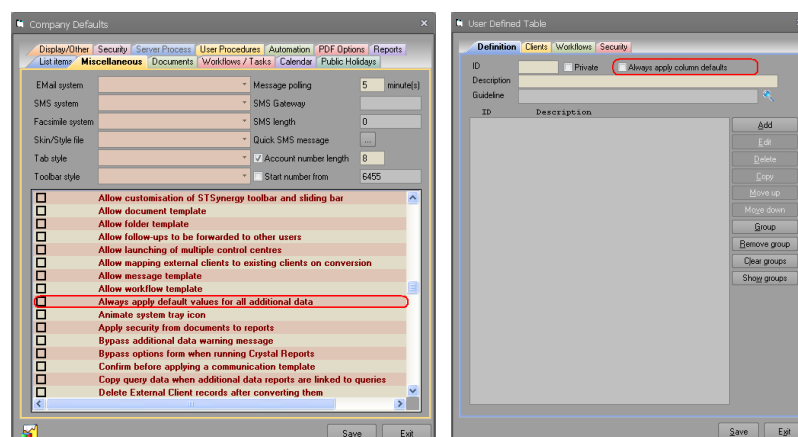


- 24) When using office and time cost system, the timesheet entry for a communication was only created when the communication was being added to the system. Thereafter, updating the date or times of the communication was not changing the corresponding timesheet entry leaving the two records out of sync. What this meant was that to get these consistent, you had to delete the old communication and recreate it with the correct date and time details which could be a lot of work to just get the timesheet entry right. In this version, we have changed this so that any change to date and/or time of communication is reflected on the corresponding timesheet entry provided that the timesheet entry is not approved and the user that is changing the date and time is the person that created the timesheet entry in the first place. No modification is applied to timesheet entry if it has been approved or someone else modifies the communication date and time.

- 25) The disbursement list box on time cost tab of the work centre was displaying some pop-up menu items under the incorrect menu item. This is fixed now.



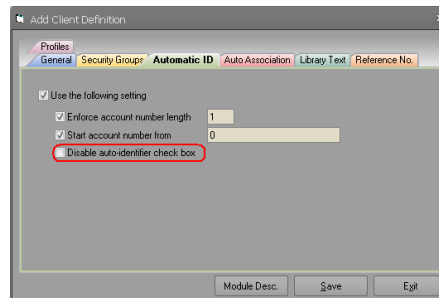
- 26) When capturing additional data, the defaults were not being applied if the additional data was partially captured. We have added a housekeeper setting that will allow all the uncaptured additional data columns display their default values both in add and edit mode. We have also added a setting to each additional data table definition that allows control of this setting at each additional data table level. You can turn on the housekeeping setting to use this for all additional data tables. Alternatively, leave housekeeping setting off and control this at each required additional data table level.



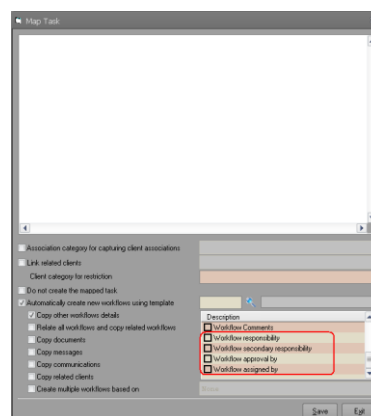
- 27) Fixed a bug in replacement symbols and additional data fields where client information was extracted from the database. Synergy was not honouring the view security group from client type setting and was displaying any data that was requested. We have added a check to ensure that the user that is extracting data has access to the client information before extracting and returning them to the user.

**Modification as at release 11.00.03**

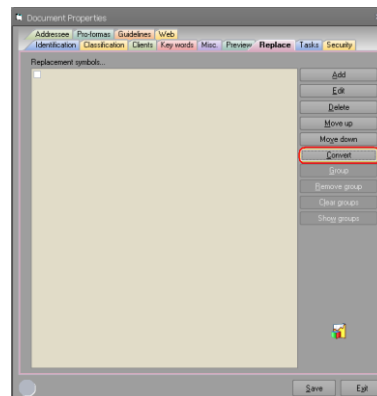
- 1) We have added ability to lock the auto-id check box in the client edit forms when automated account number generation is enabled for a client type. This is purely a user interface setting to stop users from accidentally ticking the check box and entering account number manually when an organisation is relying on automated account number generation. This setting is defined for each client type.



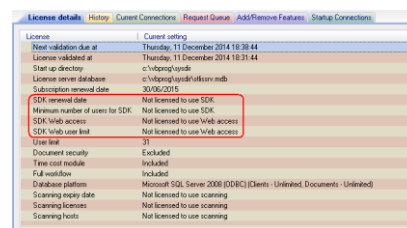
- 2) When creating matters from decisions, some clients have asked if they could copy the matter users (responsible person, secondary responsibility, etc.) from the original matter to the new matter that is being created. This version allows this to happen from the task mapping form. We have added entries for this purpose. Please note that this takes precedence over all other settings. Please also note that other data that is copied from the original matter will be restored if the user changes them while the matter edit form is displayed. However, if these users are changed while matter edit form is displayed, the changes will be saved rather than the original users being restored. There is quite a valid reason for doing this. Imagine a car delivery matter that gets created as part of a sales matter. You may want to copy the person responsible for the sales matter to the delivery matter as well so that the same sales person oversees the delivery of the car. In most cases you would not want to change the sales person and in most cases restoring the users back will be fine. However, if the sales person has left the organisation, you would want the ability to change the user to the sales person that has replaced the original sales person. Hence the reason for leaving the operator in charge of changing the users should it be required. This feature has been implemented in our Software Development Kit as well.



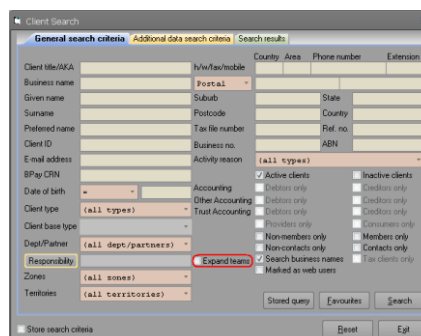
- 3) When converting additional data based document replacement symbols, Synergy was producing a run time error. This has been fixed on this version.



- 4) We had introduced a new licensing key for the web access a few versions back. To have web access though, the sites must have a proper license for Software Development Kit since one can only access Synergy data on the web using the Software Development Kit. We have added validation to our license server application to warn users when they attempt at licensing the web and Software Development Kit license keys in the wrong order. You must license Software Development Kit fully first before attempting to license web access. You must also enable web access before attempting at setting the web user limit.

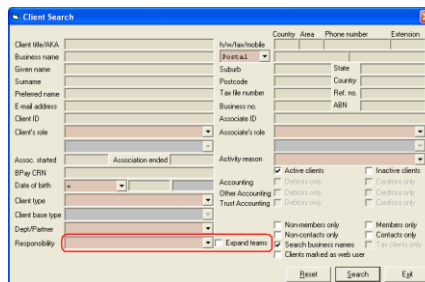


- 5) Users can select teams when searching for client responsibility from the client search form. Some sites have asked us to allow client search form to expand the teams to include its members and search for clients whose responsibility is the selected team or any member of the team. We have added a check box in the client search form for expansion of teams to its members. Please note that the secondary responsibility is also considered in these searches.

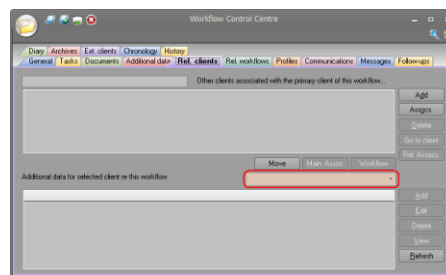




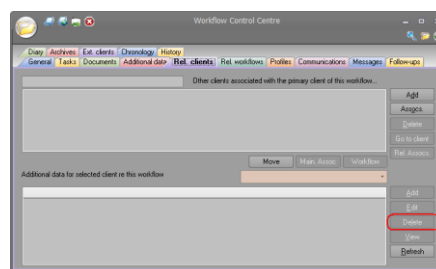
- 6) We have added a new property to our client search class called **“ExpandTeamToItsMembers”** in Software Development Kit for to provide an equivalent feature to the above feature in the Synergy user interface. We have also changed the Software Development Kit test application to allow this feature to be used. As a result of this change, we had to include display of teams in the responsibility drop down so that users can select teams. Please note that we have also extended the search for responsibility to the client’s secondary responsibility.

The image shows a 'Client Search' dialog box with various search criteria. The 'Responsibility' dropdown at the bottom is highlighted with a red rectangle, and the option 'Expand team' is visible in the list. Other fields include Client title/ID, Business name, Given name, Surname, Preferred name, E-mail address, Client ID, Client's role, Assoc. started, SPlay, Date of birth, Client type, Client base type, and Dept/Partner.

- 7) Synergy was not checking the additional data view security group for display of the additional data table drop down in the related client tab of the Matter Control Centre. This is fixed on this release.

The image shows the 'Workflow Control Centre' interface. The 'Additional data for selected client in this workflow' dropdown menu is highlighted with a red rectangle. The interface includes tabs for General, Tasks, Documents, Additional data, and Related clients, and buttons for Add, Assign, Create, Go to client, and Refresh.

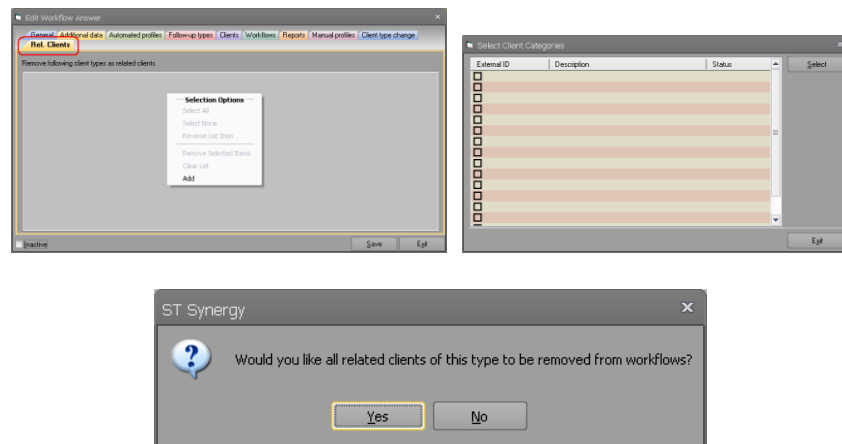
- 8) Synergy was not checking the additional data deletion security group for deletion of the additional data from the related client tab of the Matter Control Centre. This is fixed on this release.

The image shows the 'Workflow Control Centre' interface. The 'Delete' button in the 'Additional data for selected client in this workflow' section is highlighted with a red rectangle. The interface includes tabs for General, Tasks, Documents, Additional data, and Related clients, and buttons for Add, Assign, Create, Go to client, and Refresh.

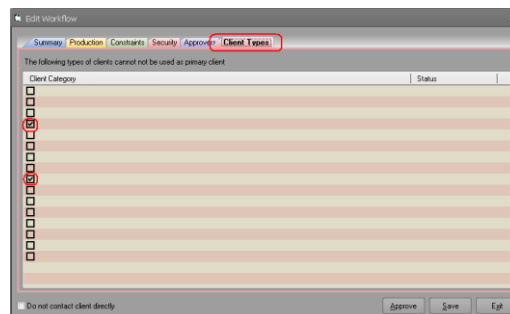
- 9) Sometimes it would be useful to allow removal of related clients from a matter when a matter decision is made. For example, consider a sale and delivery matters. Imagine at during the sales process, a car dealer reserves a specific car for the customer by linking the car as related client to the sales process. When deliver matter is created, one can copy the allocated car to the delivery matter which allows a delivery team to know which car needs to be delivered to the customer. However, if the customer decides not to proceed with purchase of the car, one may want to unlink the car from the sales process so

that it becomes available in the pool of cars for allocation to other sales processes. This was not possible in previous versions and we have added this feature to our question and answers in this version. A new tab allows users to specify what types of related clients should be unlinked. In doing so, the user is asked whether all related clients of the selected type to be removed or allow selection of related clients for removal. Please note that removing related clients are done before capturing additional data for related clients as well as adding new related clients to the matter for two reasons:

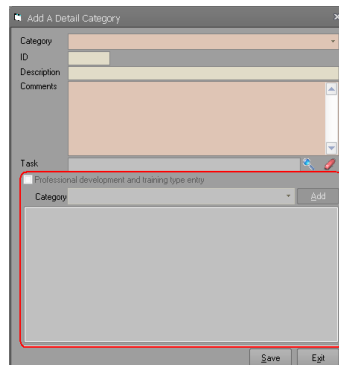
- 1) It will remove the necessity to capture additional data if related clients are configured to be removed.
- 2) It will avoid deletion of the newly added related clients by mistake.



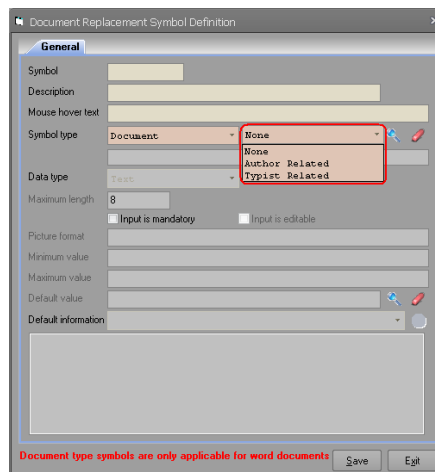
- 10) Some clients have told us that their users create matters against wrong client types. Unfortunately, the constraint tab of a master matter requires a specific activity status to be selected as well as restricting the setting to a single client type. To allow our clients to stop their users from making mistake when creating matters, we have allowed master matters to have a list of client types that should be prevented from selection as primary clients. Once this is done, Synergy will ensure that users cannot create a matter against these client types by mistake. Please note that those that when the matter edit form is displayed, those client types that are configured for the master matter will be displayed as checked in the list. This feature has also been added to our Software Development Kit. Please note that Synergy will check the consistency of the constraints setting against the client types. It will not allow you to use a client type in the constraint tab that is disallowed from the client types tab.



- 11) There was a bug in the timesheet type form related to professional development. The form was not allowing matter types to be selected. This bug is fixed on this version.

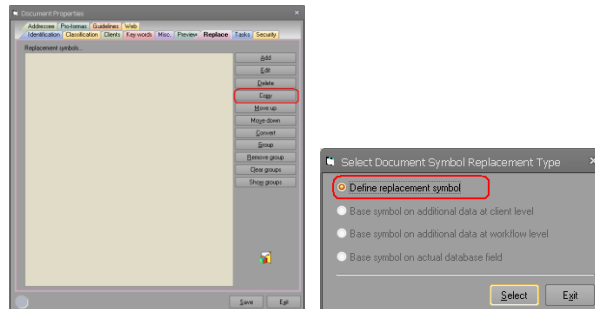


- 12) Synergy allows document replacement symbols to be other documents managed by Synergy. This facility allows sites to insert images and other documents when creating a new document from a master. Although this could be used to insert author/typist related documents into the newly created document, but it is not as seamless and straight forward. Users have to remember who the author/typist of the document is and select the right document from the list for that particular person. We have introduced a new option that allows sites to specify author/typist related documents. When this setting is selected, you would need to specify a filing classification. Once this is done, Synergy will automatically search the document repository for a document with the specified classification that is attached to either author or typist of the document and set that document as the default document for the replacement.

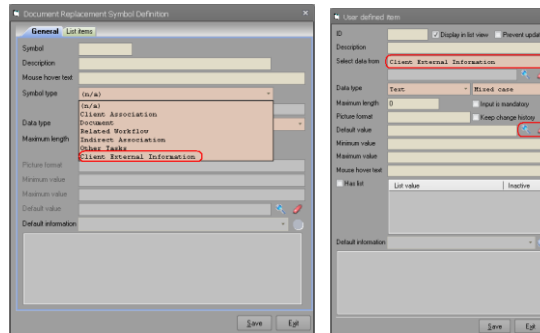


Whether the document is an image file or not will make no difference to Synergy. Should the document be an image file, it will be inserted as an image into the document. If the document is not an image file, then it will be inserted as a file into the document. Synergy will look for finalised documents and will pick one at random if it finds multiple documents matching the filling classification. The replacement field is not locked at run time and therefore users can change the document at run time should they choose to do so.

- 13) We have allowed document replacement symbols to be copied from the document properties form. Please note that the copy button is only available for normal replacement symbols not those that are based on additional data or the database fields.

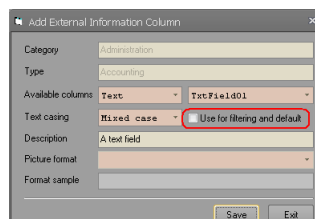


- 14) We have introduced a new document replacement symbol and additional data column type base on external information. The additional data in Software Development Kit has been extended to include this type.

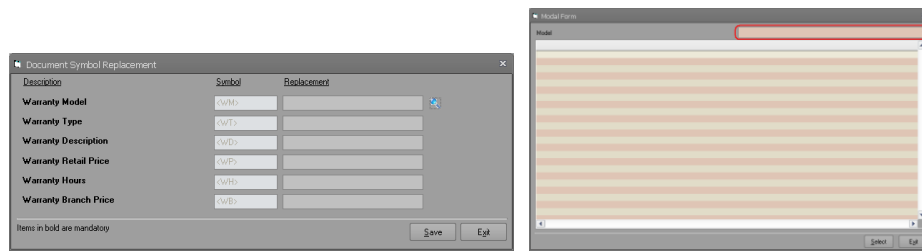


When defining these, users can select a filling classification type to indicate the external information type that is required. They can also select a client to indicate where the external information is stored and will be available from. To cater for this, we have added search and clear buttons to the additional data column form. At run time, Synergy will present all the relevant external information that is stored against the selected client for selection.

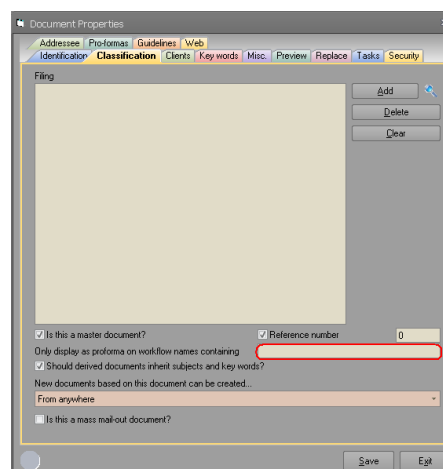
When defining these, users can specify which column of the external information will be used for by selecting them from the default information drop down. To assist the selection of the external information, we have allowed administrators to define one of the external information columns for filtering and default.



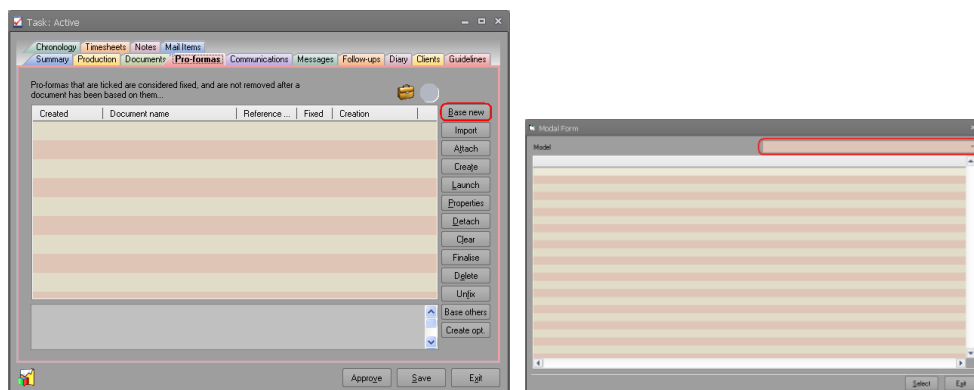
When a filtering and default is defined, Synergy will present the distinct values stored in this field in a drop down in the external information selection form for filtering.



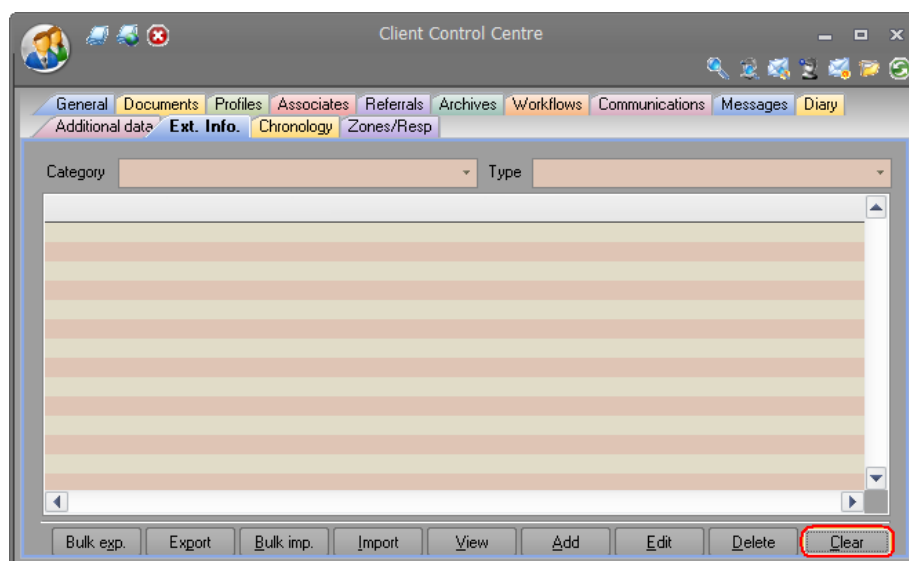
- 15) Imagine that you are a car dealer selling various cars (Ferrari, Lamborghini, McLaren etc). You have configured a single sales matter for selling these cars. As part of the sales process, you have a defined a task that allows your sales reps to create formal quotations to your customers. In this scenario, you have defined different quotes for different types of cars because you wanted to have the photo of the car as well as the features of the car described inside your quotation document. Given that you have a single sales matter, you will have to attach all these sales quotations to this task on the master matter to allow your sales reps to create quotation for any type of car that is being sold. It is ideal to reduce the list of proformas that are displayed on this task to those that are relevant to car that is being sold. To cater for this, we have added a text field to the master documents that allows administrators to specify a string for filtering proformas. When this string is entered, the proforma will only be displayed on matters that contain this string in their name. In the above example, the quote for Ferrari will have “Ferrari“ in this field and the quote for Lamborghini will have “Lamborghini” etc. If the sales matters for selling contains the name of the car (e.g. Ferrari, Lamborghini etc.), the Synergy will display the correct quote against the correct sales matter. When this field is left blank, the proforma will be displayed on all tasks. This field has no effect on master matters. Please note that this is just a display setting. All proformas are linked from master matter to live matters. This setting only controls its display. If you remove a string from a master proforma, you will be making the proforma available on all matters.



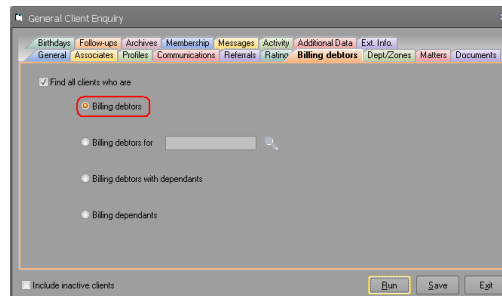
- 16) When creating a document from a proforma, the description of the workflow will be used to determine a default entry for the external information drop down when a filtering and default field is defined for the external information. For example, if you have defined an external information field called “Model” and your external information contains “Ferrari”, “Lamborghini” and “McLaren” in this field, your model filtering drop down on external information selection form will contain these three models. If your matter description contains Ferrari, then the external information drop down will default to Ferrari and the list will only contain external information where model is defined as Ferrari. This could assist users to default to the correct external information when selecting replacement symbols from matters. Please note that when the matter name does not contain any of the entries in the drop down, all of the records will be displayed.



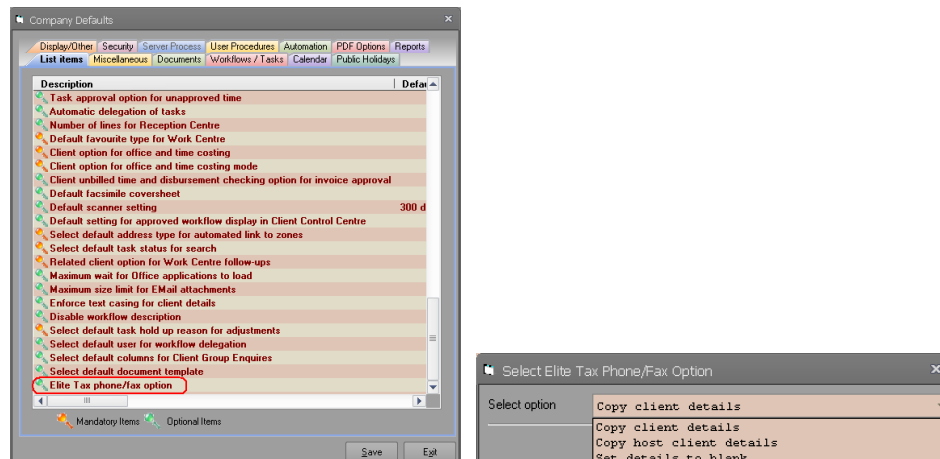
- 17) In many occasions, administrators may want to import external information but may want to delete everything first before importing new data. There was no easy way of clearing the entire external information before import. We have added a clear button to the external information tab of the Client Control Centre. This button will be available to all those who are authorised to maintain the external information.



- 18) When selecting billing debtors in the new enquiry form, the returned clients included the billing dependents when an accounting backend was linked to Synergy. This bug is fixed in this release.

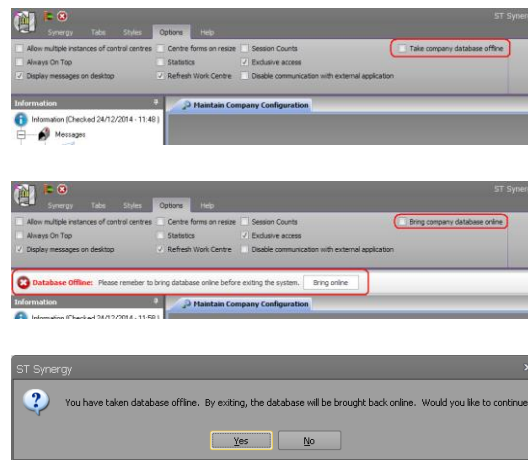


- 19) Added an option that allows those clients that have integration with Elite Tax system to define what Synergy should do for email, www, phone, and fax details of a client. There are three options provided, leave it as blank, copy the details from the client record, or copy the host client details. To preserve the existing behaviour, the default is set to copy the details from the client record.

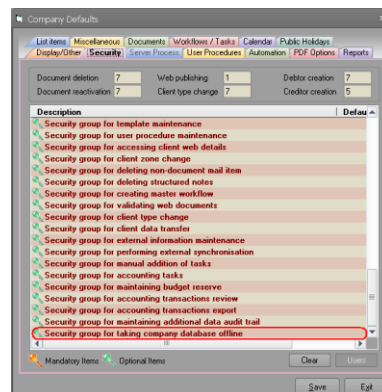


- 20) We have provided facility in the add/edit company form to mark Synergy company databases offline. When administrators are upgrading databases, the database is taken offline so that no other user can log into the system and interfere with the database upgrade. Some administrators have told us that at the end of the year, they need to run some end of year reports and when running these reports they do not want anyone be in the system. This can be achieved with the current facilities in the system but administrators will need to go through a few steps to achieve this. They also will need to remember to bring the database back online after they have finished their work. In this version, we have provided a much simpler facility to achieve the same thing. We have added a check box to the options tab of the Synergy toolbar called "Take company database offline". When this check box is ticked, Synergy will bring the company database offline, hence disabling other users from connecting to the database. At the same time a message bar is displayed at the top of the Synergy desktop reminding the user that s/he has taken company database offline. Should the user decide to exit/log off from Synergy, the system will pop up a message telling the user that by exiting, the company database will be brought online. This way, the user will be reminded at the

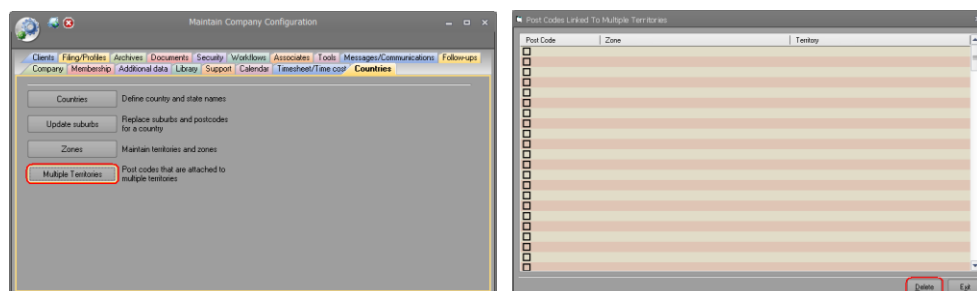
conclusion of the work and the company database will be brought back online automatically upon exiting the system. This provides, by far, a more user friendly solution.



We have also added a security group to control which users will have this check box on the options toolbar. By default, only system administrator can take database offline. Set this security group to enable other to have the same authorisation.



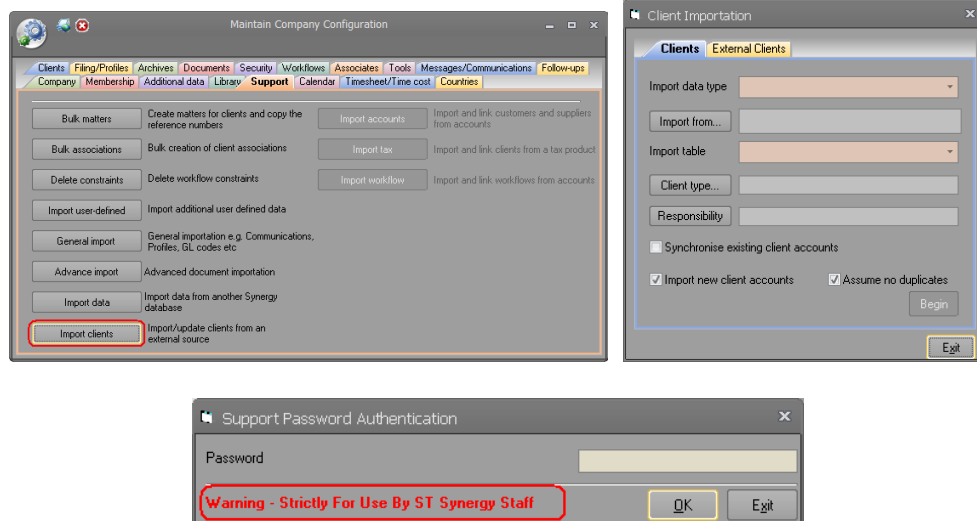
- 21) There were no easy method to work out which post codes are linked to multiple zones and territories. This could cause headache if sites are relying on each post code to be linked to a single territory and zone. We have added a new form that will list all the post codes that are linked to multiple territories. Users can select the list entries and use the delete button to remove the link between the post code and the territory.





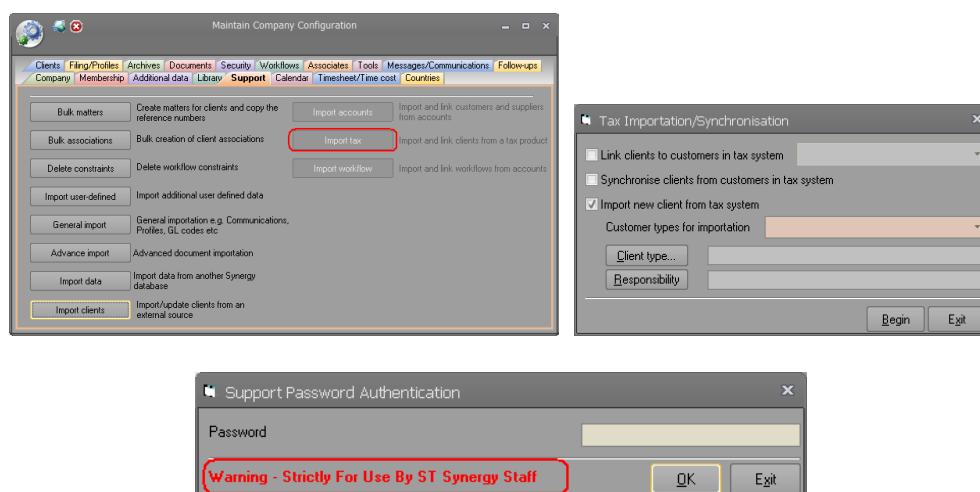
- 22) Importing and synchronising clients were not adding zones to the client record. We have amended the importation process to include zoning as well.

**Please note that features in support tab are strictly for use by ST Synergy Staff and is not for use by clients. Do not use any of the features in the support tab even in the unlikely event that you have miraculously worked out the support password.**



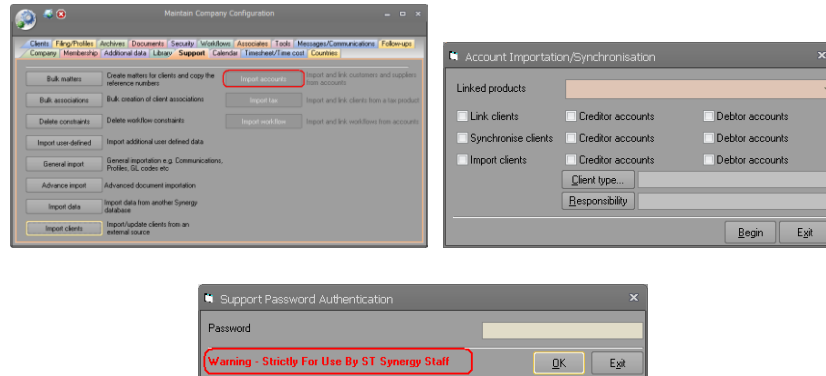
- 23) Importing and synchronising clients from tax product were not adding zones to the client record. We have amended the importation process to include zoning as well.

**Please note that features in support tab are strictly for use by ST Synergy Staff and is not for use by clients. Do not use any of the features in the support tab even in the unlikely event that you have miraculously worked out the support password.**



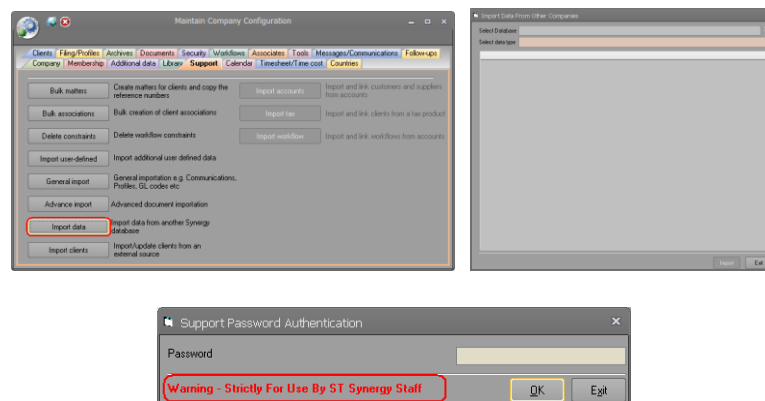
- 24) Importing clients from accounting product were not adding zones to the client record. We have amended the importation process to include zoning as well. Please note that clients are auto-zoned only on importation.

**Please note that features in support tab are strictly for use by ST Synergy not for use by clients. Do not use any of the features in the support tab even in the unlikely event that you have miraculously worked out the support password.**



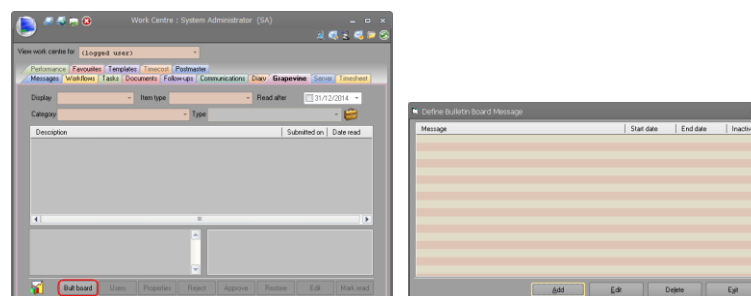
- 25) Fixed some bugs in the importation of data from other databases such as importing document URL, setting the groups correctly for additional data and document replacement symbols, importing replacement symbols, linking masters to the mater templates, allowing profiles, additional data columns and question and answers to be imported when their external identifier is duplicate (duplicate external identifier for these entities are allowed within Synergy). We have also added ability to import external information definitions to this form.

**Please note that features in support tab are strictly for use by ST Synergy not for use by clients. Do not use any of the features in the support tab even in the unlikely event that you have miraculously worked out the support password.**

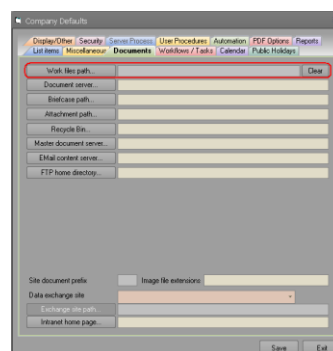


- 26) We introduced ability to pass a working file path to Synergy using “/A” switch so that the users did not have to be part of local administrator groups. There was a bug in the implementation of this feature that did not allow reports to run or the email attachments to be zipped. Administrators had to copy some of the Synergy executable components to the working file path for these features to work. This bug is fixed on this release.

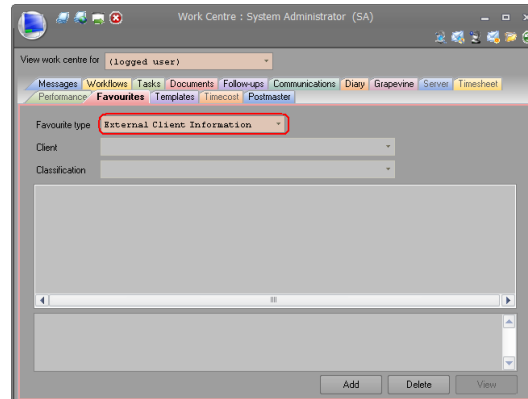
- 27) When deleting additional data from the Software Development Kit, it was not preventing deletion if there were audit trail records attached to the additional data and the user was not allowed to delete audit trail records. This has been fixed on this release.
- 28) There was a bug in deleting additional data definitions. If the additional data columns had list values or basic information, they could not be deleted. This bug is fixed now.
- 29) When deleting queries, Synergy was unlinking the query from additional data reports before deleting the query. We have changed this to stop people from accidentally deleting any query if it is linked to additional data or user defined reports.
- 30) We have added a new method to our workflow object in our Software Development Kit called “ApproveWorkflow”. This method allows bulk approval of matters when the user is authorised to do so. The property name **CanApproveMatter** is changed to **CanApproveWorkflow**, please rename this property name in your application. A simple find and replace should do this easily as there are no other changes in terms of parameters or return values.
- 31) Synergy Housekeepers had to use housekeeping form to see and maintain all bulletin board messages. We have changed this so that they can now maintain all messages from the Work Centre grapevine tab. We are also displaying the bulletin board messages for maintenance in a list view with more information.



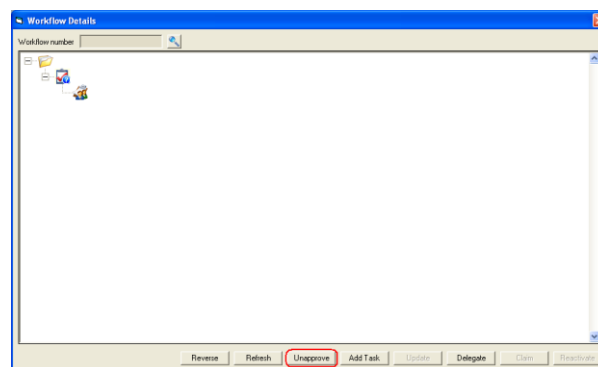
- 32) When a working file path is passed using “/A” command line switch, Synergy was still using the working file path specified in the company defaults. What this meant is that administrators must ensure that the working file path in the company defaults and the working file path specified through command line switch are identical. We have changed Synergy so that when a working file path is specified through command line switch, that folder is used and the one specified in the company default form is ignored.



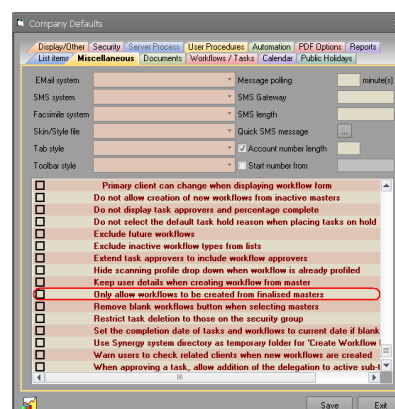
- 33) Some clients are using client external information and have asked us whether we can provide facility to mark some clients that hold external information data in their favourite list. We have created a new favourite type called “External Client Information”. Administrators can now use this to display external information in the favourites tab of the Work Centre.



- 34) We have allowed activation of finalised matters from our Software Development Kit. We have amended our test application to demonstrate this.

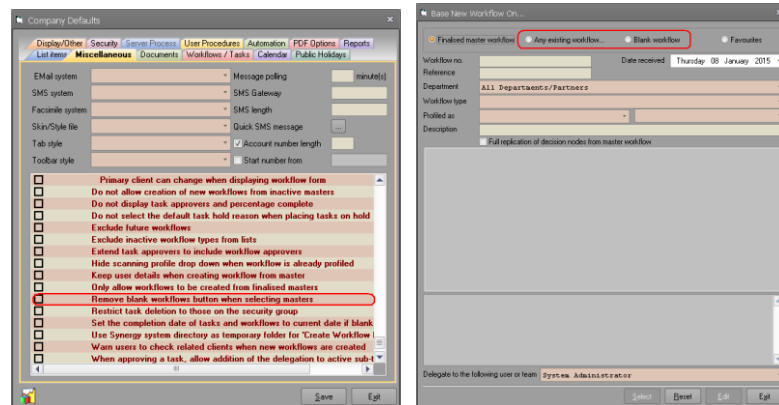


- 35) Synergy was not considering “**Only allow matters to be created from finalised masters**” company default options. We have fixed this bug in this version in both Synergy user interface and our Software Development Kit.

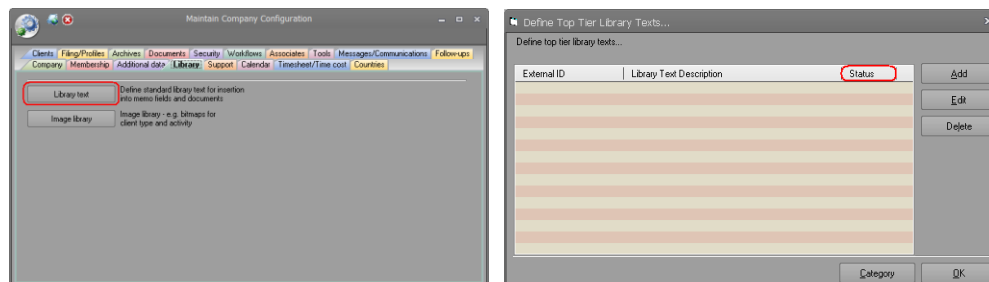


- 36) The “**Only allow matters to be created from finalised masters**” was mixed up with the “**Remove blank matters button when selecting masters**”

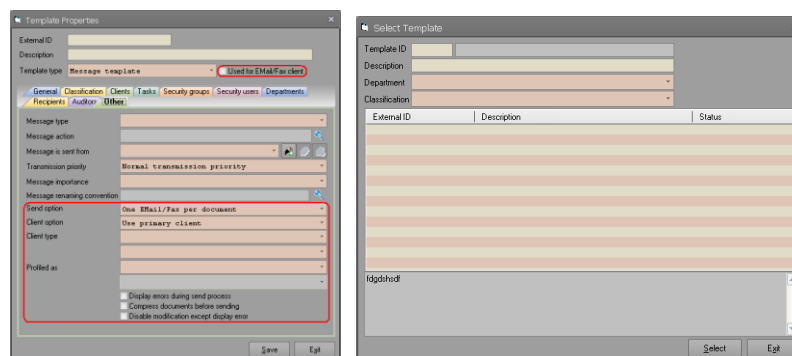
options. When selecting the former option, it was turning on/off the later property in the application. The former option was not being set all under any circumstances and hence by looking at the company defaults, one may have thought that s/he has stoped creating matters from active matters but in reality, that option was removing the exiting and blank matter radio buttons from the master matter selection form. This has been fixed on this version.



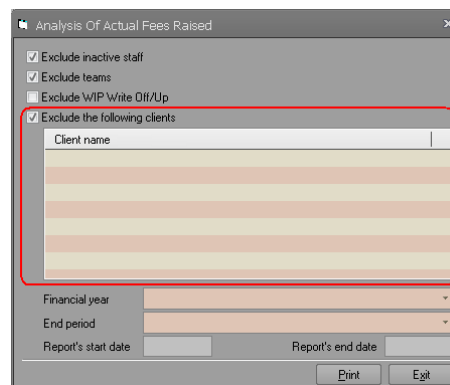
- 37) The library text list displayed from Housekeeping was not displaying the activity status. Consequently, it was difficult to see which library text records were inactive. We are now displaying the status of the library text in the list view.



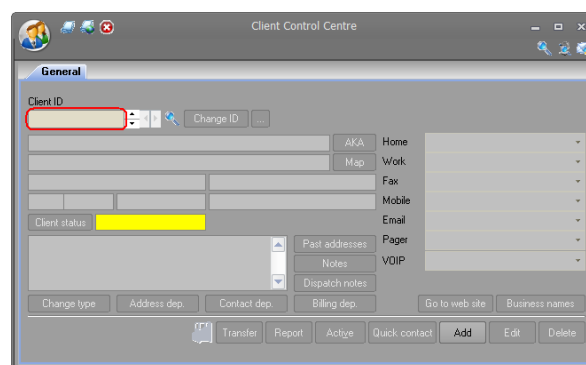
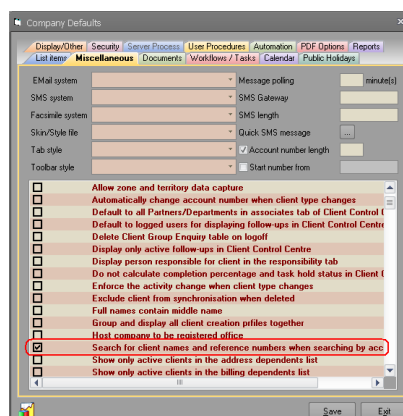
- 38) Added ability to limit message templates for use with Email/Fax client feature. Administrators can now lock the Email/Fax client controls so that the operators cannot change the defaults being set at the template level. This should avoid any errors in bulk emails or faxes. We have also changed the template selection form to only allow templates marked for use by Email/Fax client feature to be selected on these forms.



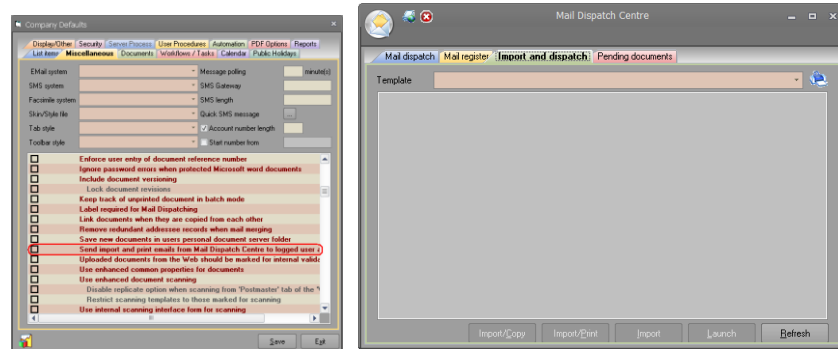
- 39) Added ability to exclude clients from the time cost actual fee report. This will be useful in cases when host clients are changed. For example, let say that ABC Pty Ltd was the host client and the site have many administration matters linked to this host client. Let's assume that these admin matters do have time cost entries. When running this report, all matters linked to the host company will be excluded from the report, hence all the fees related to these admin matters while no show up as part of the report. Imagine that the owners of ABC Pty Ltd have sold the business and the new owners are XYZ Pty Ltd. If the new owner creates a new client with this name and sets this new client as the host client, when running this report, all the fees for those admin matters linked to the ABC Pty Ltd will show up in the report. This is not correct as those fees are not real recoverable fees. In order for this report to show the correct figures, all the matters linked to ABC Pty Ltd as well as all matters linked to the XYZ Pty Ltd must be excluded from the report. The client exclusion list allows sites to do this.



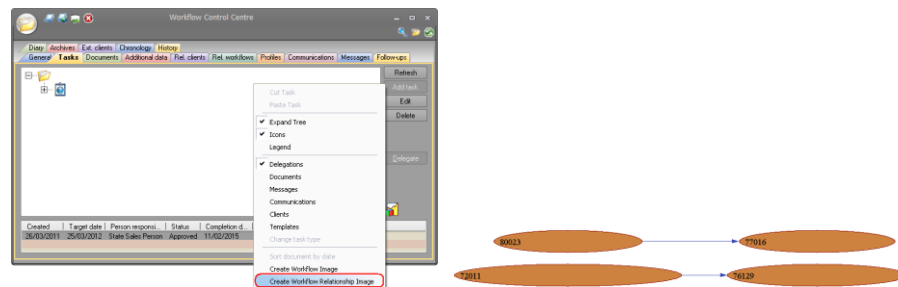
- 40) In previous versions, we introduced a HK setting that allowed searching the client name when users enter something in an account number field. We have extended this to include search by client reference number. So when user enters something in the account number field, if the entered data matches a client account number, the client will be returned. If there was no match, then the client name will be searched for all clients with similar name. If any client is located, then that client will be returned. If Synergy could not match account number and name, then it will try looking for clients with similar reference number. If one located it will be returned. Otherwise nothing will be selected.



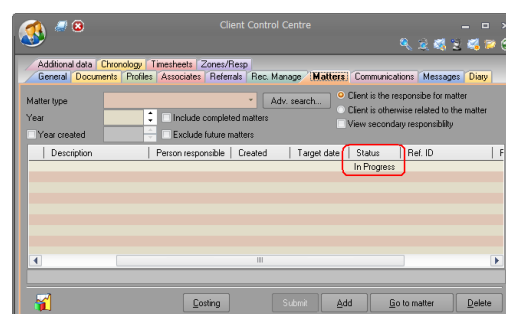
- 41) There is a security group that allows sites to provide access to import and dispatch tab in the Mail Dispatch Centre. The users within this security group will all also receive an email containing the log file of the process. In many cases, sites may want to restrict access to this feature but only send the email message to the person that is performing the operation so that they have a hard copy of the process. We have added a new HK setting that allows those emails to be sent to the logged user as well as the system administrator. This setting is turned off by default to preserve previous behaviour of the system.



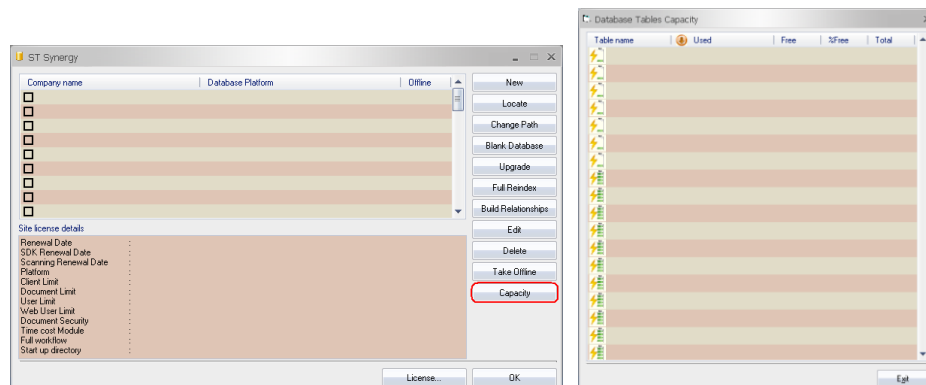
- 42) Sometimes it would be useful to work out which master matters are being used to create matters from other masters. This was not possible in previous versions. We have added a new popup menu option on the task tab of Matter Control Centre which will be enabled if a master matter is loaded in the control centre. Using this menu option, you can get a graph of all the master matters that are used to create other matters. This graph is similar to workflow image graph with one difference that the nodes will only display the master matters. Please note that inactive masters are excluded from the graph.



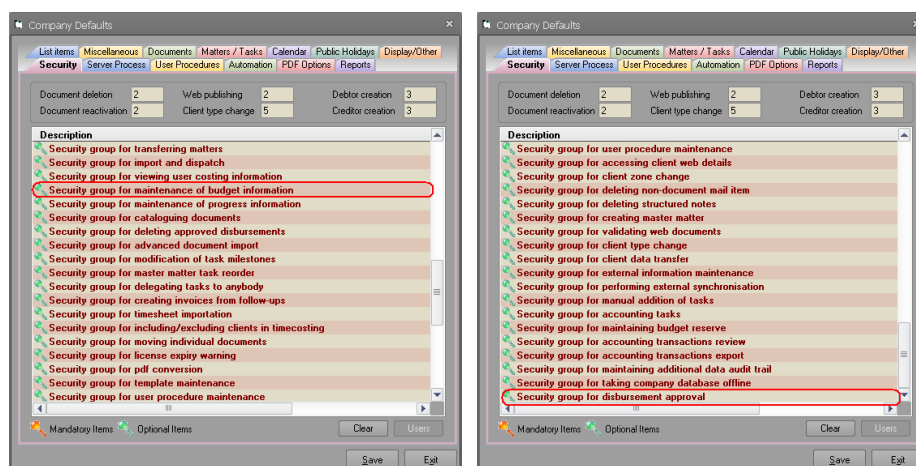
- 43) In previous versions, the status column in the matters tab of Client Control Centre was displaying Active, Inactive and On hold. We have changed status to In Progress, Approved and On Hold respectively.



- 44) When using Technology one as accounting back end, the transaction table contains a field to store the period number. This is the month number based on the financial year that is set up in the system. We have now added a billing period identifier to the Technology One transaction table that will allow users to get the exact date range that period number refers to rather than having to work out what the range is.
- 45) We have added a capacity button to the company maintenance form. This button allows database administrators to monitor how full a table is based on its primary key.



- 46) In the previous versions, approval of disbursement and budget maintenance was tied to the same security group. In many cases, administrators may want to allow someone to approve disbursement but be unable to touch the budget information or vice versa. To allow this, we have split this security group into two. The existing budget maintenance security group will remain as the controlling group for maintaining the budget information. The new security group will control disbursement approvals. As part of the upgrade, to this version, both settings will use the existing budget maintenance security group.



- 47) If administrators do not include a person in the matter modification security group, that person will not be able to maintain budget or reserve even if s/he is part of the relevant security group. In this version, we have changed the matter edit form and allowed those that are in these security groups to have access to the relevant tabs in that form. That way, they can maintain the



information that they are allowed to maintain regardless of whether they are part of matter edit security group.

The screenshot shows the 'Matter Details' window with the 'Disb. Budget' tab selected. The window contains several sections: a table with columns 'Disbursement category', 'Disbursement type', 'Budget', 'Unapproved', 'Approved', and 'Variance'; a 'Budget amount' field; a 'Short description' field; an 'Approval date' field; an 'Approval time' field; a 'Comments' text area; and a table with columns 'Description', 'Approved by', 'Approved on', 'Adjustment', and 'Total Budget'. An 'Exit' button is located at the bottom right.

48) We are now displaying the creator and the last user that updated a disbursement in MCC and WC.

The screenshot shows the 'Work Centre' window with the 'Disbursement' tab selected. The window displays a table with columns 'Invoice', 'Tax paid', 'Approver', 'Approval date', 'Created by', and 'Updated by'. The 'Created by' and 'Updated by' columns are highlighted with a red border. At the bottom, there are buttons for 'Unapprove', 'Launch', 'Edit', and 'Delete'.

The screenshot shows the 'Matter Control Centre' window with the 'Disbursement' tab selected. The window displays a table with columns 'Invoice', 'Tax paid', 'Approver', 'Approval date', 'Created by', and 'Updated by'. The 'Created by' and 'Updated by' columns are highlighted with a red border. At the bottom, there are buttons for 'Unapprove', 'Write off', 'Write up', 'Launch', 'Add', 'Edit', and 'Delete'.

*Modification as at release 11.00.02a*

- 1) We have discovered a critical bug in the calculation of invoice amount for disbursements. The invoice amount was not including any taxes applied to the disbursement. This bug is fixed on this release and we strongly recommend you to install this release if you are using time costing system.
- 2) Synergy requires full access to the application installation folder because it uses the installation folder for copying/creating files. While there is a setting in the company defaults that allows sites to use a network folder as the temporary working folder, Synergy still need write/modify access to the installation folder because during the start up process, a number of files will be created/written to this folder. Some clients have expressed that their auditors are concerned that this set up could impose security risk. To address this concern, we have allowed sites to pass a command line argument, specifying the directory that Synergy uses during the start up process. This directory could be any drive or UNC path, as long as the logged user has full access to this folder, Synergy will use that folder for creating/writing files during the start up process. Following is an example of the command line argument that pass c:\Temp as the start up folder that Synergy should use:

“/AC:\Temp

“/A” is designated to indicate the start up folder in the command line and the rest is the actual directory that should be used. Please note that you must pass a directory after /A and the directory must exists and be writable by the user. If any of these conditions fail, Synergy will display a message and terminate.

- 3) In previous releases, when approved disbursements and invoices were being reversed, the Technology One records were written for the same billing period that the original disbursement/invoice was set up with. This has been changed so that all disbursement/invoice reversal transactions will be added in the current billing period.

## Modification as at release 11.00.02

- 1) We have added ability to keep audit trail of additional data changes. Sites can specify at the additional data column level whether history of changes should be kept for the additional data column.

The 'User defined item' dialog box is shown. It has fields for ID, Description, Select data from (with a dropdown), Data type (Text, Mixed case), Maximum length (0, Fixed, Input is mandatory), Picture format, Default value, Minimum value, Maximum value, Mouse hover text, and Has list (List value, Inactive). The 'Keep change history' checkbox is highlighted with a red circle.

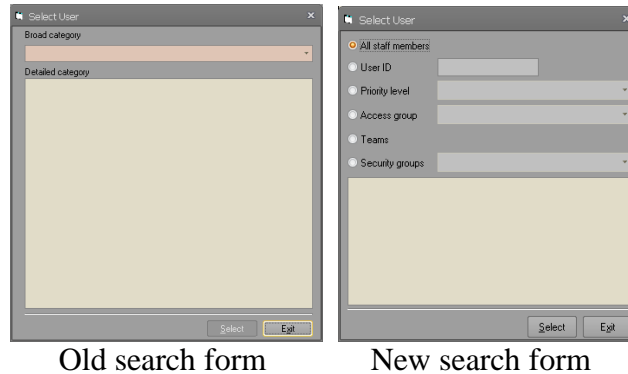
- 2) We have added a security group that allows site to specify who can view and maintain additional data history records. By default everyone can delete these records. Set this security group should you want to restrict this feature to specific set of users. With this security group in place, only users within this security group can delete additional data that have history records.

The 'Company Defaults' dialog box is shown. It has tabs for List items, Miscellaneous, Documents, Workflows / Tasks, Calendar, Public Holidays, Display/Other, Security, Server Process, User Procedures, Automation, PDF Options, and Reports. The 'Security' tab is selected. It shows a list of security groups with checkboxes. The 'Security group for maintaining additional data audit trail' is highlighted with a red circle.

- 3) We have added one new button in the additional data tab of Client Control Centre and Matter Control Centre to allow those authorised to view and maintain history records for additional data rows.

Two screenshots are shown. The left one is the 'Workflow Control Centre' window, showing a table with columns: Client Account, Client Name, Competitor Brand, Competitor Machine Type, and Competitor Model. The 'History' button is highlighted with a red circle. The right one is the 'Additional Data Audit Trail' window, showing a table with columns: User name, Date and time, Machine name, Logged as, Old value, and New value. A 'Select Class Options' dialog box is open over the table.

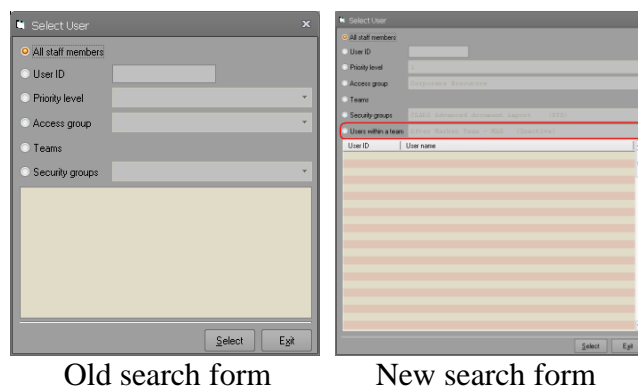
- 4) When selecting users from some places, the form that was being displayed was only allowing access groups to be used for selection of user. In our view, this was very restrictive and not flexible enough. We have changed this form to allow selection of users using a more flexible user selection from that we use in other areas.



Old search form

New search form

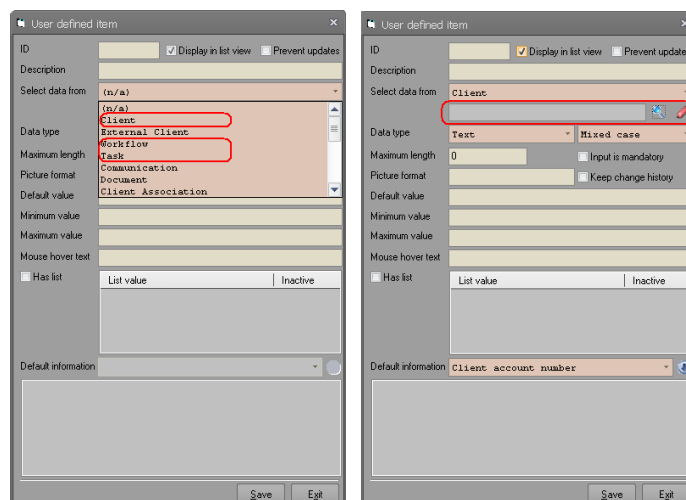
- 5) We have added a new option to our user selection form to allow selecting users from within a team. We have made the list a sortable list in this form.



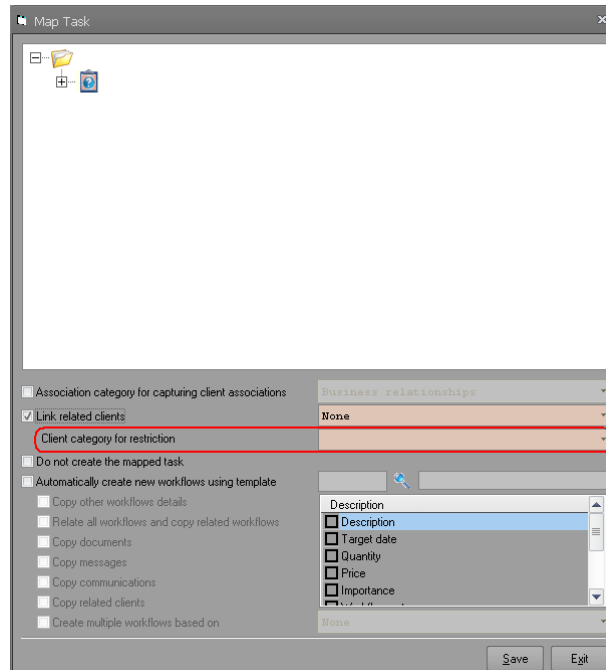
Old search form

New search form

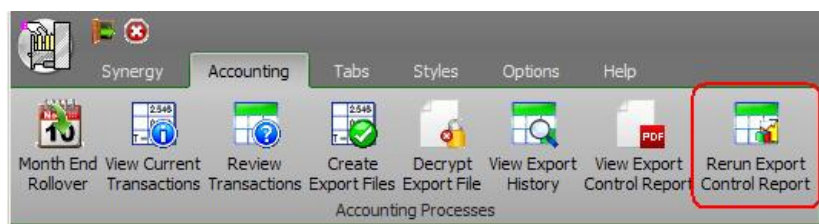
- 6) Some clients have asked us to provide ability to restrict selection of additional data for client, matter and task type items. We have added this facility on this version.



- 7) When decisions are made, Synergy allows the process to add related clients to the matter. In doing so, users can select any type of client to link to the matter. Some sites have asked us if it is possible to provide a facility to restrict the client types when linking them as related clients to a matter. We have added this facility to the task mapping process. Please note that a single client category can be selected. This change has been implemented in our Software Development Kit as well. We have added an extra parameter to the event that is raised for this process and in this parameter; we pass the details of the client category as `clsSTSDKItem` class. When client category is not configured, you will receive a null object as parameter one.




- 8) A new ribbon bar option has been added to the accounting tab to allow rerun of Technology One export control report for historical exports.



- 9) There have been some changes to the Technology One Export Control Crystal Report.
- ❖ We have added the creditor/debtor identifier to this report and removed the “Transaction Created By” column.
  - ❖ The grouping of the report has changed. We now group the records by transaction type, creditor/debtor identifier, and document identifier.
  - ❖ We have added the disbursement category external identifier to the report.
  - ❖ We have added a new total line for creditor/debtor grouping.

- ❖ On reruns of this report for historical exports, the report date and time will be the current date and time and they will be displayed in red colour. We have also added a red “Reprint” label so that these reports cannot be confused with those that have been run during the real export.



Technology One Export File Control For

Batch Number: 000000001

Report Date/Time: 18/06/2014 19:28:24

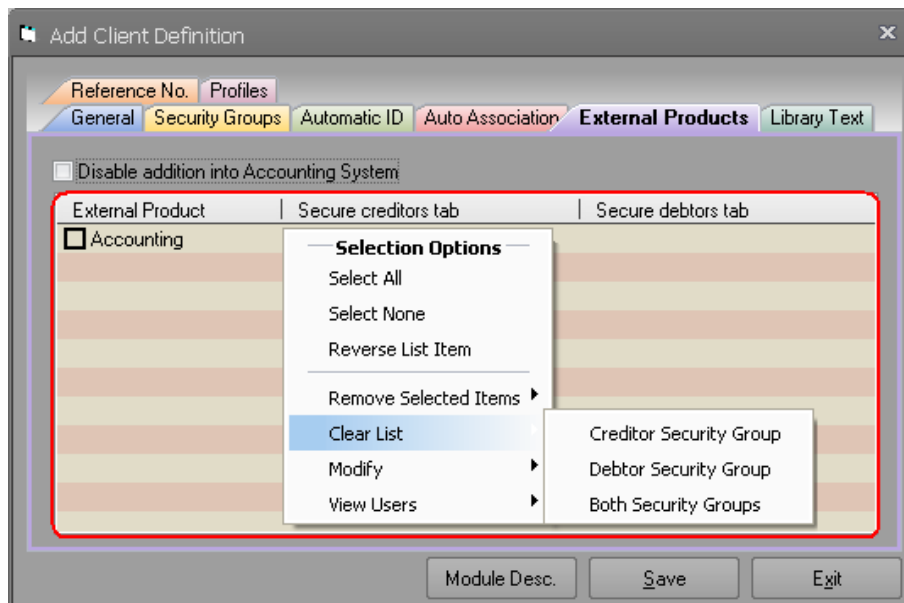
Export Date/Time/User: 02/05/2014 19:50:02

Reprint

Accounts Payable

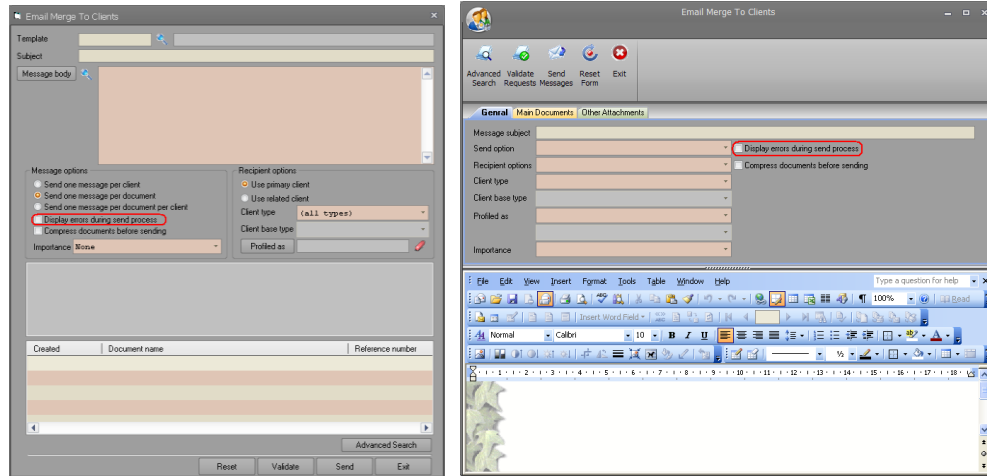
Date of Payment	Doc. ID	Invoice Date	Invoice Lines	Reference Number	Master Number	Net Amount	GST Amount	Total Amount	Entered By	Modified By	Approved By	Client Identifier	Credit Name
Claim Payment													
1	Total for					\$10,000.00	\$0.00	\$10,000.00					
2	Total for					\$10,000.00	\$0.00	\$10,000.00					
3	Total for					\$10,000.00	\$0.00	\$10,000.00					
Total for Accounts Payable						\$10,000.00	\$0.00	\$10,000.00					

- In previous versions of Synergy, sites only had the ability to display or hide the debtor and creditor tabs for an accounting system as a whole. There was no facility to allow these tabs to be visible only for certain Synergy users and certain client types. We have now added the ability to specify a security group for the visibility of the debtor and creditor tabs for various accounting systems at the client type level. This allows sites to secure display of accounting information to certain employees should they wish to. There are menu items as you can see to manipulate the security groups any way a user wishes to. You can also view the users in a security group by using the view menu. Apart from the view menu, all other maintenance menus will operate on the ticked entries if there is more than one. If Synergy finds no entry that is ticked, then it will manipulate the highlighted entry from the list. As you can see from the menu, you can operate on creditor or debtor or both security groups. The only menu that does not have “Both Security Groups” sub-menu is the view users menu.

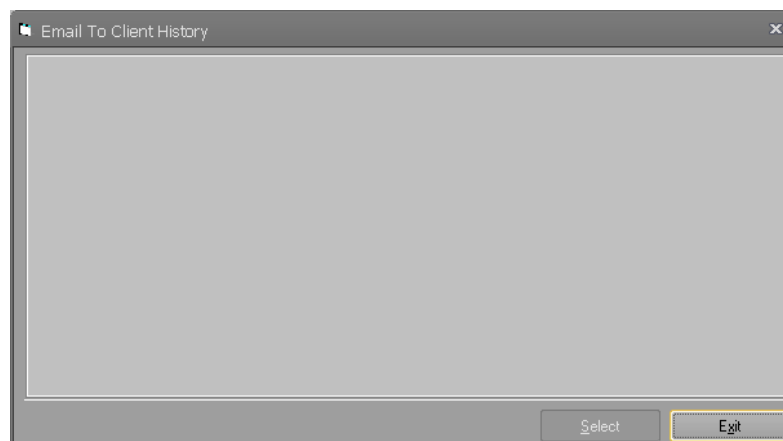


- We have added a check box to email client forms that allow users to specify whether error processing during the mail send should be trapped and displayed. When this check box is turned on, on the first send error, the user will be given the option to abort the process. If the user decides to continue,

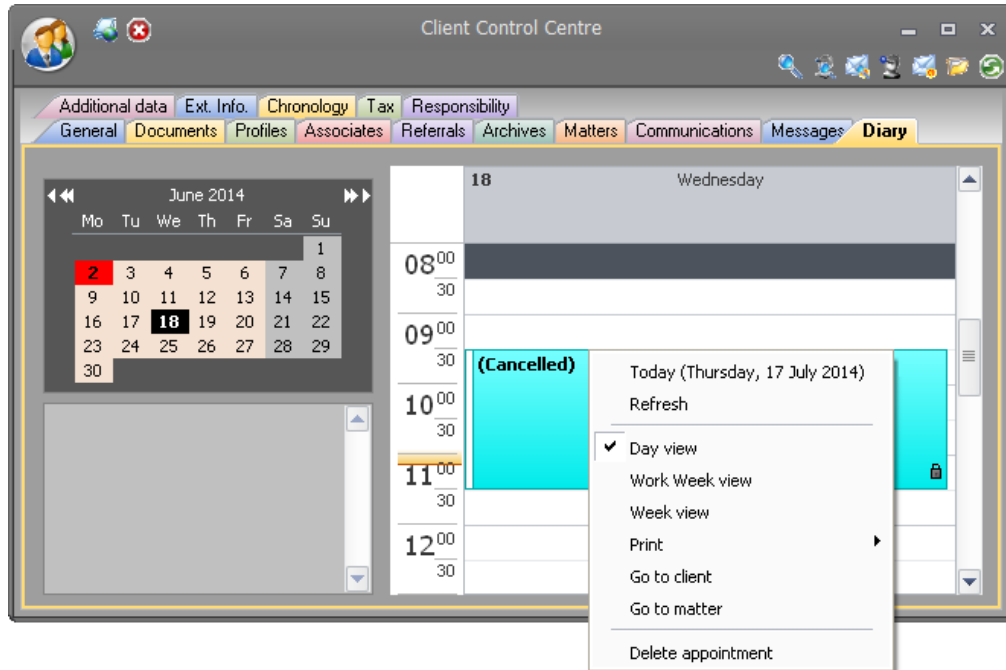
on second error, the user will be given the option to turn off error checking. If the user decides to leave the error checking, thereafter, there is no option for the user to do anything, any error will be displayed and the user just have to click the OK button to proceed with the next send.



- 12) In the previous versions, when creating bulk email or faxes from the documents tab of the Matter Control Centre, any faxes or emails that failed to be sent was being left in user's work centre out box. Sending these messages from out box was not using the exact setting that was used when these bulk emails were created. We have now added a bulk email header record to our database which keeps track of which messages were created from the email/fax client routine in Matter Control Centre. When users perform this function, Synergy will check the system to see if there was any previously batches that had failed to send all the messages. If it finds any batches, the list will be displayed and the user is given a chance to continue processing these messages. If user exits the selection form, the process continues on and user is allowed to create a new batch. We have also changed the messages that are sent from out box. If these messages are created from the bulk message creation routine, Synergy will use the setting that was active at the time of creation to send the email. Please note that if file compression is used, this will be honoured if the compression application is still set. The naming convention will be the naming convention that was used at the time of the message creation and not the current setting.



- 13) In previous versions, when user clicked on an appointment, the popup menu allowed user to create follow-up, create communication, notify client via email, fax and SMS. These options are now removed from the popup menu for cancelled appointments.



- 14) Sending bulk SMS to clients were not filtering out the cancelled appointments. We have filtered the cancelled appointments from the bulk SMS process.



- 15) Added a check box to the matter search form. When ticked, the created by drop down will include a list of all active teams. When a team is selected from the drop down, search will include the matters created by any active member of the selected team. This change has also been reflected in our Software Development Kit, that is, if you pass a team user identifier in the

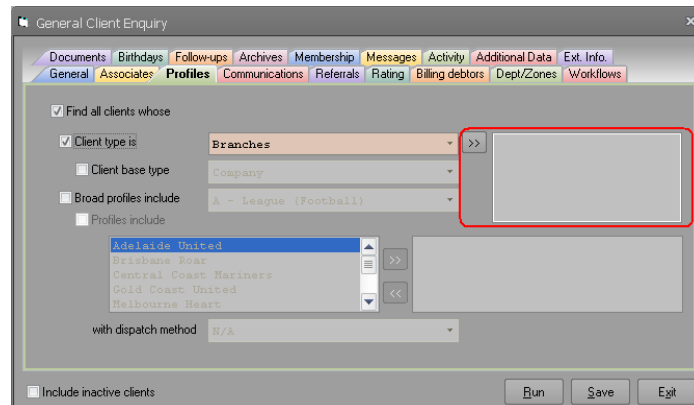


created by field of the workflow search class, the library will return you a list of all the matters that active members of that team has created.

- 16) Fixed a bug in query parameter form related to memo fields. In previous versions of Synergy, users were unable to run queries with memo fields as parameters. This bug is fixed in this release.

- 17) Validation of the disbursement and time budget against the total budget was not working properly due to double floating point number comparison. We have changed this so that the comparison is done up to two decimal places. Please note that the values will be truncated to the second decimal place before the comparison is done.

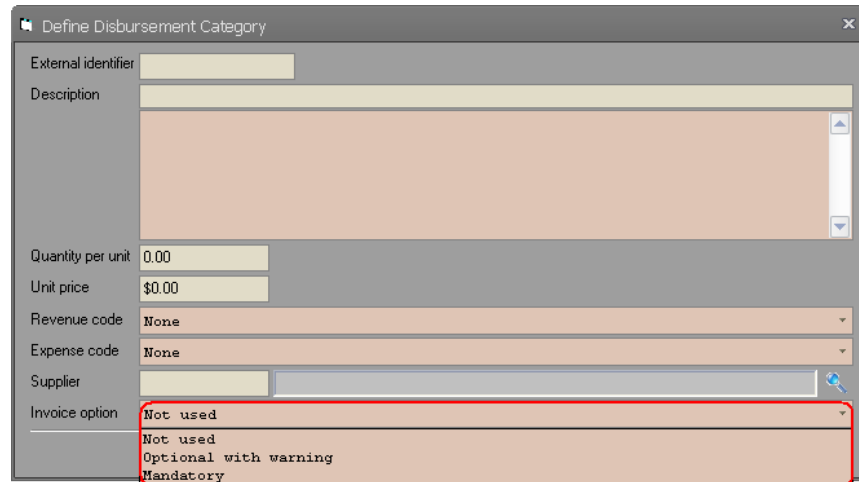
- 18) We have added ability for users to search for multiple client categories from new enquiry form. Please note that this facility is only available if your enquiry is about client category. Selecting client base type will ignore the selected client categories. If you leave the list empty, the selected client category from the drop down will be used for the enquiry.



- 19) We have eliminated the tasks of master matters from appearing in the task tab of the Workcentre. We have also removed the master matters from the matters tab of the Workcentre.
- 20) We have used the user's default team to select the team in the teams drop down of the task tab in the Workcentre.

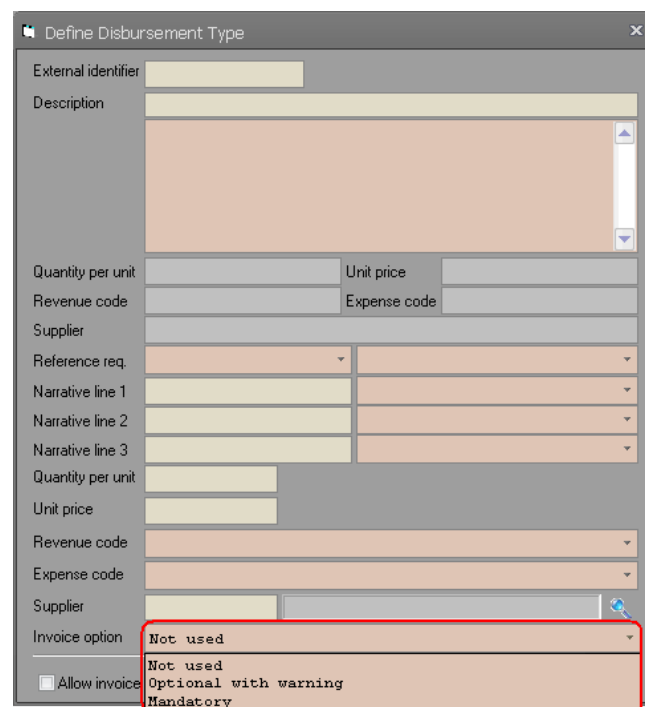
**Modification as at release 11.00.01**

- 1) Added more flexibility by allowing disbursement category to dictate whether an invoice document is optional, optional with warning, or mandatory for a disbursement category.



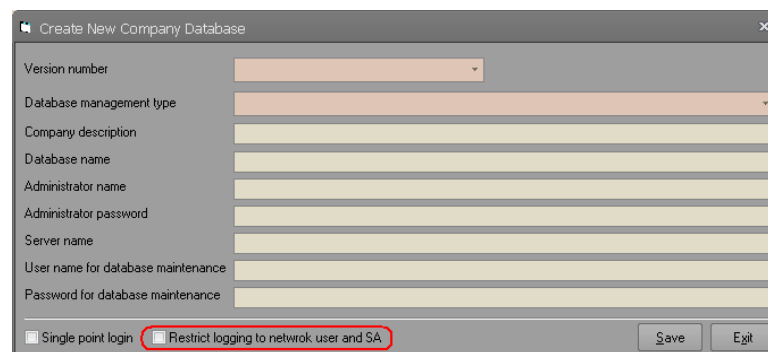
The screenshot shows the 'Define Disbursement Category' dialog box. The 'Invoice option' dropdown menu is open, displaying three options: 'Not used', 'Optional with warning', and 'Mandatory'. The 'Mandatory' option is highlighted with a red box.

- 2) Added more flexibility by allowing disbursement type to dictate whether an invoice document is optional, optional with warning, or mandatory for a disbursement type. Please note that when both disbursement category and type is set to a specific option, then the disbursement type invoice option takes precedence over the disbursement category. If there is no option set for the disbursement type, then the disbursement category invoice option will be considered. Please also note that the disbursement approval has been changed to consider these settings. If disbursement invoice is set as mandatory, any disbursement without an invoice document cannot be approved.



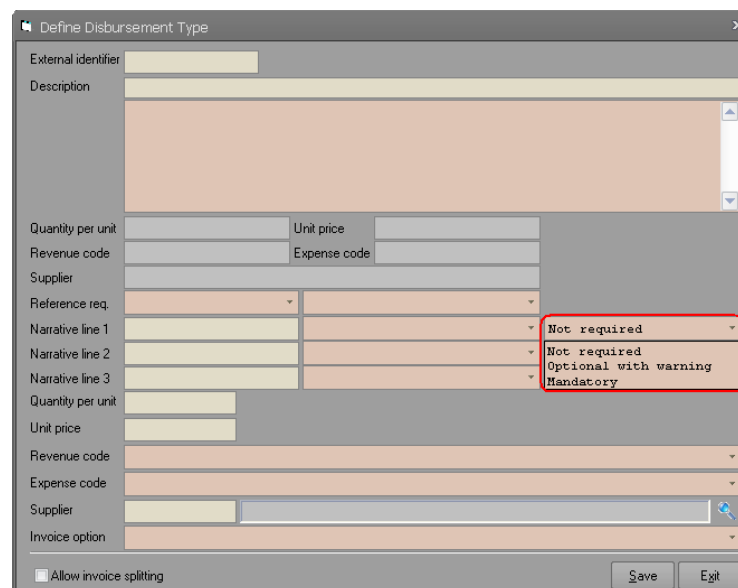
The screenshot shows the 'Define Disbursement Type' dialog box. The 'Invoice option' dropdown menu is open, displaying three options: 'Not used', 'Optional with warning', and 'Mandatory'. The 'Mandatory' option is highlighted with a red box.

- 3) Added a new setting that will only allow changing user to System Administrator when a company is set for single login. This functionality has been provided from the same place where single login is available. Please note that you can only turn this setting on if you are allowing single login for a company. With this feature turned on, no one can log onto Synergy apart from the person that is logged on to network. Please note that with this setting turned on, sites will have much tighter control over the login process in Synergy.



The screenshot shows the 'Create New Company Database' dialog box. It contains several input fields: Version number, Database management type, Company description, Database name, Administrator name, Administrator password, Server name, User name for database maintenance, and Password for database maintenance. At the bottom, there are two checkboxes: 'Single point login' and 'Restrict logging to network user and SA'. The 'Restrict logging to network user and SA' checkbox is highlighted with a red rectangle. There are 'Save' and 'Exit' buttons at the bottom right.

- 4) We have allowed a mandatory and optional setting for each narrative line for disbursement types. Please note that these settings will only be available for systems integrated with Technology One accounting system.



The screenshot shows the 'Define Disbursement Type' dialog box. It contains several input fields: External identifier, Description, Quantity per unit, Unit price, Revenue code, Expense code, Supplier, Reference req., Narrative line 1, Narrative line 2, Narrative line 3, Quantity per unit, Unit price, Revenue code, Expense code, Supplier, and Invoice option. The 'Narrative line 1' dropdown menu is highlighted with a red rectangle, showing options: 'Not required', 'Optional with warning', and 'Mandatory'. There are 'Save' and 'Exit' buttons at the bottom right.

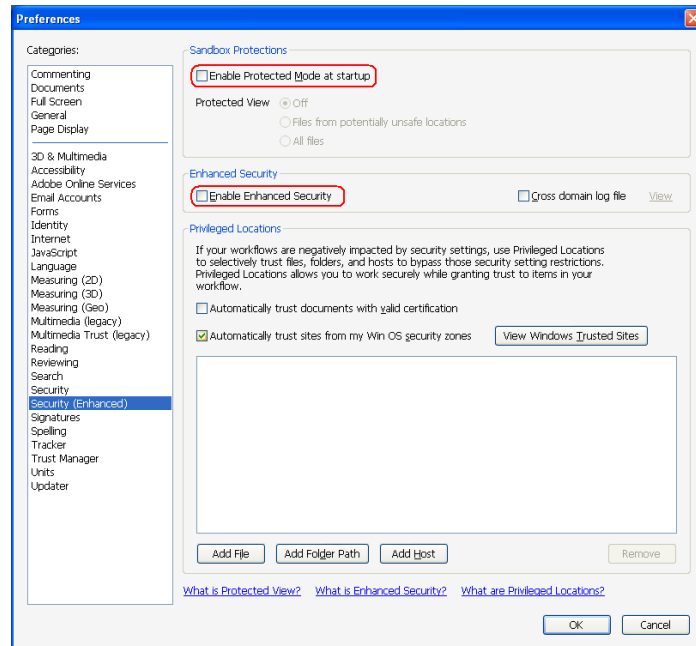
- 5) In some cases, when entering disbursement, depending on the way a supplier has calculated the tax, the calculated tax in Synergy may be off by one cent. For example, a supplier may sell an item for a total \$11.60 including GST. In this case, your GST exclusive amount will be  $((11.60 / 11) * 10)$  which is \$10.54545. The GST, however, will be calculated as  $(11.60 / 11)$  which is \$1.054545. In this case the supplier has to round down the GST to \$1.05 and round up the GST exclusive amount to \$10.55. Since Synergy only allows GST exclusive amounts to be entered, when a user enters \$10.55 as the GST exclusive amount, Synergy calculates GST as \$1.055 which is rounded up to \$1.06. In this case the calculated tax in Synergy is off by \$0.01 due to the way

the supplier has calculated the tax. Some sites have asked us to provide means of allowing Synergy to truncate the calculated tax for disbursements. In this version, we have added a check box to the disbursement form that allows truncation of the tax when it is calculated in the form. This check box will be considered when any changes force a recalculation of tax figure in the form. A check box is provided for both the expense as well as the revenue cycles.

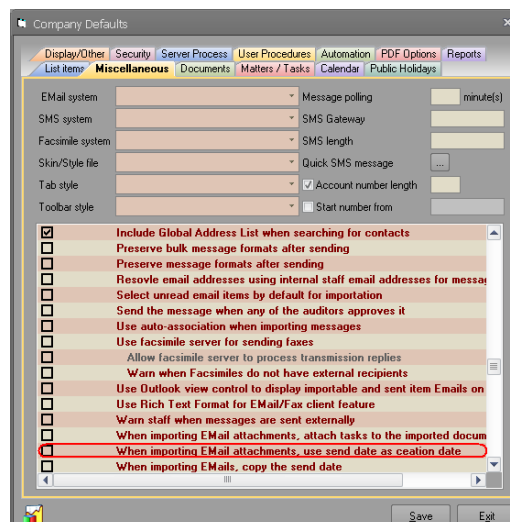
The screenshot shows a software window titled "Add Claim Cost: Inspection". It has three tabs: "Details", "Expense", and "Documents". The "Expense" tab is active. Inside the "Expense" tab, there is a checkbox labeled "Truncate to two decimal places" which is checked. Below this checkbox is a table titled "Expense General Ledger". The table has six columns: "Tax/GL flag", "Amount", "GL code", "Tax code", "Rate", and "Tax". The first row of the table has a "\*" in the "Tax/GL flag" column. The rest of the table is empty. At the bottom of the window, there is a checkbox labeled "For prompt processing" and two buttons: "Save" and "Exit".

- 6) When entering date incurred in the disbursement form, Synergy will automatically select the correct billing period for the entered date. However, for closed billing periods, clicking save button will not allow the user to save the disbursement because you cannot add disbursement to closed billing period. We have changed Synergy to leave the billing period as it is, if the entered date falls on a closed billing period.
- 7) Adobe has apparently changed the DDE server name in their recent versions from what it was before in Version 9.X (acroview). Adobe's recommendation is to read the DDE server name from HKEY\_CLASSES\_ROOT registry key under the section "**acrobat\shell\open\ddeexec\application**". We have changed Synergy to read this registry key and use the server name for printing PDF files using DDE. Please note that Adobe's installation packages do not set this key appropriately. For example, we did install the Adobe Reader XI V10.0.7 on our servers. However, when we looked at this key, the DDE server name was set to "AcroReaderR10" which was for version 10 of Adobe not version 11. You can find numerous references and questions on the Adobe forums <https://forums.adobe.com> indicating various problems with Adobe installation packages etc. If things are not working, please check this registry key on the machine and ensure that it does exist and have the correct DDE server name for the version of Adobe reader that is installed. For reader prior to version 10, the server name should be "acroview". The naming convention used by Adobe for later versions are AcroViewRXX where XX is the product major version number. You may also need to turn off "Enable protected mode on startup" and "Enable enhanced security" options from the preferences, security enhanced section. Please only turn these options off if you encounter issues with printing. Just like anything else, Adobe has placed a security

badge on this change and so far has got away with it just like anything else that carries a security badge.

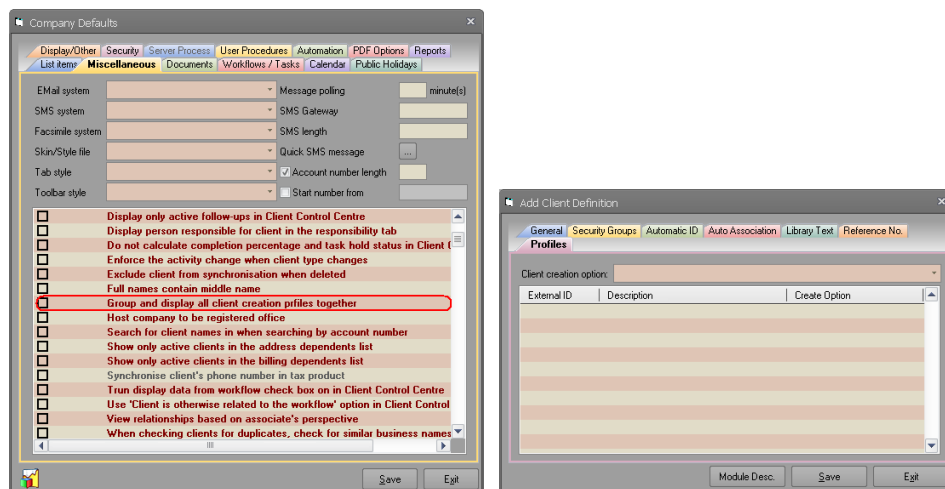


- 8) We have added the disbursement type budgets to our full costing details report.
- 9) When importing email attachments into Synergy, the creation date of the attachment will be set to the current date. Some sites have asked whether Synergy can set the creation date of the imported document to the send date of the message. That way, the imported message and the document will appear in the same order in the chronology tabs. We have provided an option that these sites can use to set the creation date of the attachment to the send date of the message.

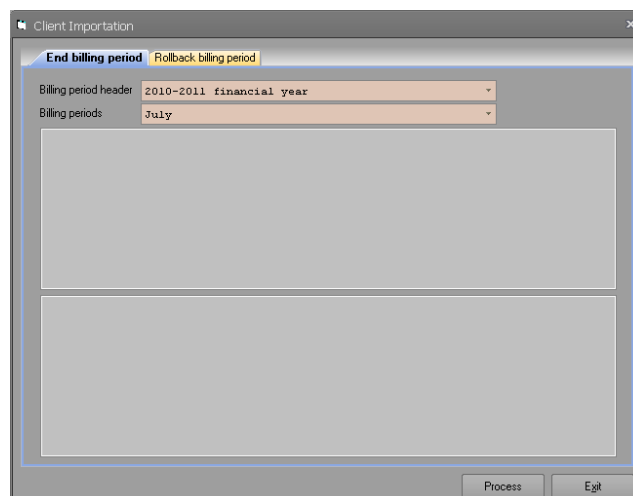


- 10) In previous versions, we allowed client creation profiles to be configured per client type. Furthermore, these profiles can be defined as optional or mandatory. When these profiles are configured as mandatory, Synergy will

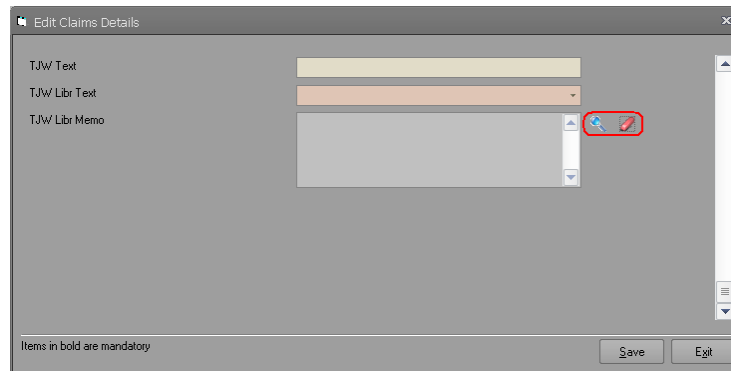
pop up a separate selection form for every profile that have been configure for the client type. That way, at least one profile type has to be selected for every mandatory profile category. Some sites have asked us to allow all configured client creation profiles to be grouped and displayed in a drop down and allow users to select whatever is required rather than displaying a separate list for every profile category. We have added a new setting to Synergy that allows sites to do this. Please note that with this setting turned on when multiple profiles are mandatory, selection of a single profile type from a single profile category will be accepted as valid by Synergy. We suggest turning this setting on if and only if this is acceptable. If all mandatory profiles have to be selected by a user, please turn this setting off. We have also added a new tab to the client type form which displays the configured profiles.



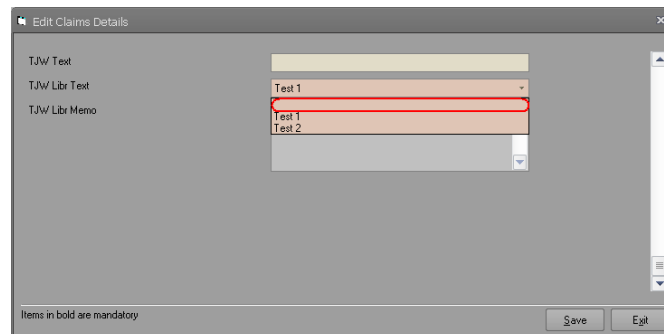
- 11) In month end rollover process, Synergy will not proceed if it finds any unapproved invoices that are linked to the period that the user is attempting to close. We have added an extra validation and that is ensuring that there are no unapproved disbursements that are linked to the period. We have also added two lists to the form that will display all unapproved invoices and disbursements to the user. It will assist in identifying the invoices and disbursements and process them.



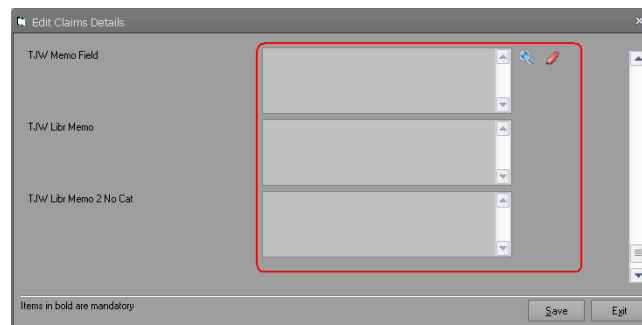
- 12) When a memo additional data field was restricted to extract data from a specific category, Synergy was not displaying values in a drop down as it was the case for text fields. This is understandable since memo fields can have megabytes of data. However, there was also no search button to allow user to search and set the correct value for the field. We have allowed the search button to be visible for these cases. There was another issue related to mandatory/optional setting of these fields. When these fields were defined as optional, there was also no clear button visible to allow the field to be set to blank. This issue have also been fixed on this release.



- 13) When an optional text additional data field contained list items, the list did not contain a blank entry. This way the user had no choice but to select an entry despite the fact that the selected item might not be required. This issue has been fixed on this release by adding a blank entry to the list.

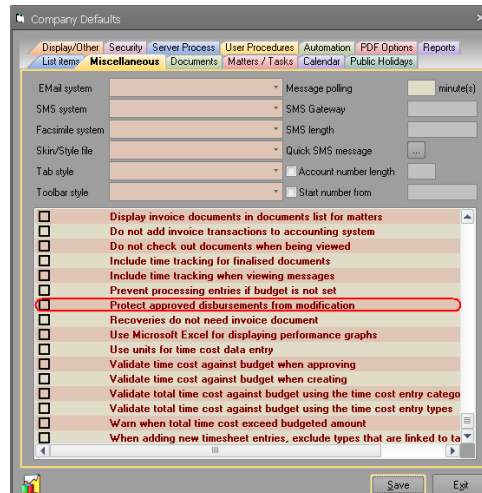


- 14) We have found a couple of issues when users grouped memo fields in additional data. These are all now fixed.





- 15) We have added an option that allows users to protect some disbursement information from modification when they are approved. With this option, turned on, users will have to unapprove the disbursement before changing anything. The data that will be protected by this option is, reference number, description, comments, date incurred, billing period, comments, the invoice document, and supporting documents in the documents tab.

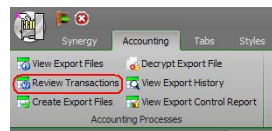


**Modification as at release 11.00.00**

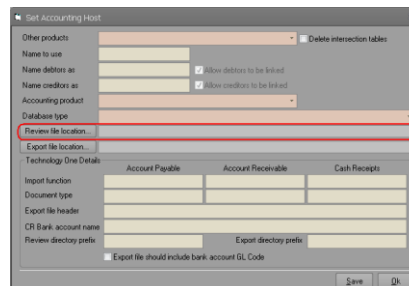
- 1) We have added support for SQL Server 2014 in this version. Just as a reminder, here is a list of Native Client drivers that Synergy would use for ODBC connection for various SQL Server platforms when Native Client connection is set in add/edit company form:

SQL Server 2005	SQL Server Native Client (SQLNCLI.dll)
SQL Server 2008	SQL Server Native Client V10.0 (SQLNCLI10.dll)
SQL Server 2012	SQL Server Native Client V11.0 (SQLNCLI11.dll)
SQL Server 2014	SQL Server Native Client V11.0 (SQLNCLI11.dll)

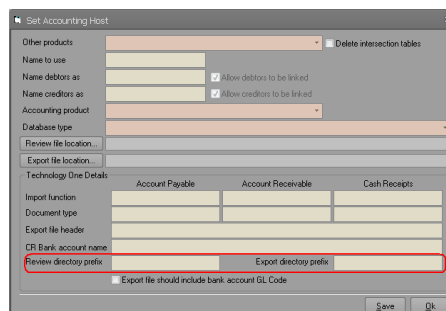
- 2) We have added a batch number to Technology One export to distinctly identify each transaction export.
- 3) We have added a review process for Technology One before transactions can be exported. The review process is identical in every sense to export process. The only difference is that the transactions remain in pending state until the reviewer approves the transactions in which case the transactions will be marked ready for export with its own distinct batch number.



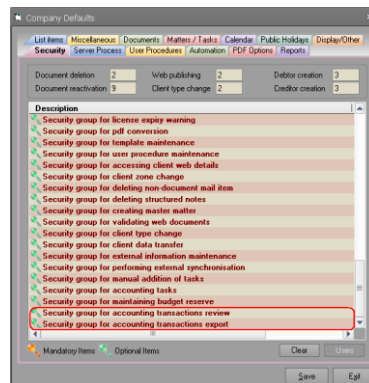
- 4) We have allowed a review directory to be stored against the accounting system details. This directory will be used to store the documents required for reviewing the Technology One transactions.



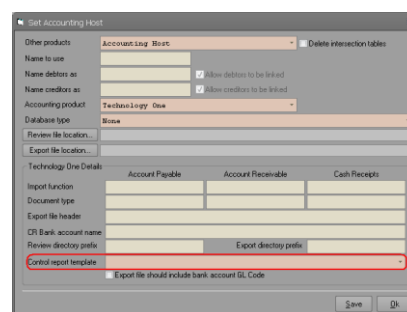
- 5) We have allowed a directory prefix to be stored against the accounting system details. This prefix along with batch number, current date and time will be used to name the review and export directories.



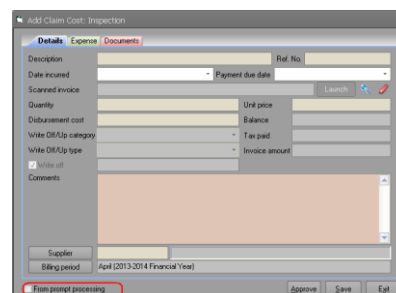
- 6) Briefcase functionality has been made a part of the review and export processes rather than being a separate user initiated process. All of the supporting documents for each Technology one transaction (identified by document identifier in the csv file) will be stored on its own directory. This will help to isolate documents for each transaction. The folders will be named using the transaction type (AP, R or CR) along with the document identifier.
- 7) We have added two new security groups to control the two groups of users for review and export process for Technology One integration.



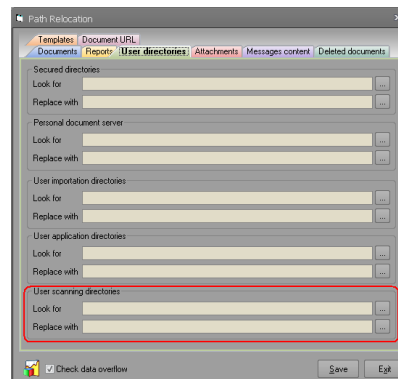
- 8) We now store a PDF version of the export/review control report in Synergy. To assist with this storage we have added ability to store a document template in company default for this purpose.



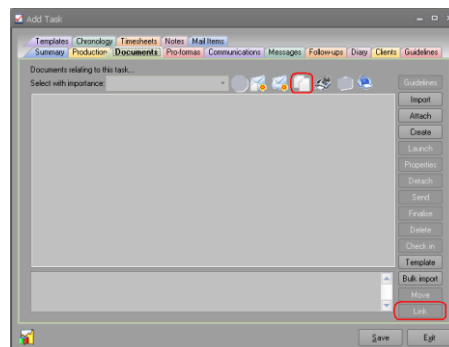
- 9) In previous versions, when running the report for an export history, the report was run from the existing transactional data. Since we are storing the report in PDF format, in this version, running historical report will only load this PDF file rather than using transactional data.
- 10) We have allowed disbursements to be marked with a prompt payment flag. This will assist sites to process these marked transactions separately to all the other transactions should they wish to do so.



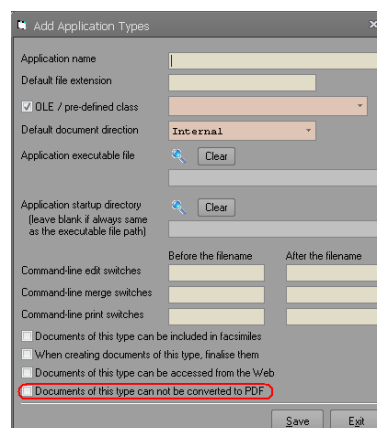
- 11) The user scanning directories were missing from document path relocation form. We have added user scanning directories to this form.



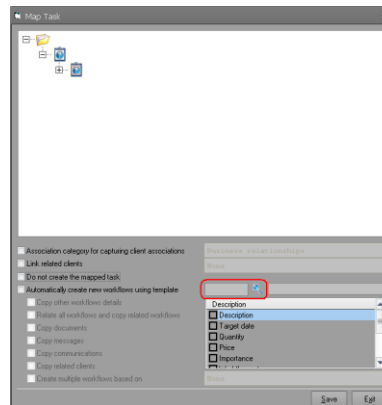
- 12) The copy document button in the task form will now consider multiple selections from the list box. The user will be asked if there are entries ticked to ensure that the ticked entries the ones s/he wants to copy. If there are no entries ticked, then the highlighted entry will be copied. We have also added a link button to this form to allow linking documents to tasks of other matters.



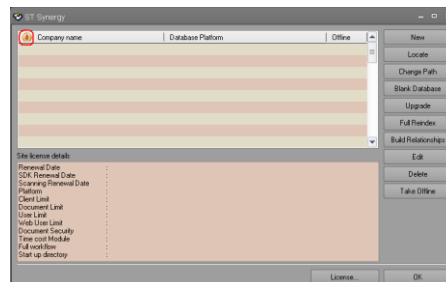
- 13) Added a flag to application types to allow administrators to indicate which document types can be converted to PDF. This flag will be checked before asking user whether s/he wants to convert the document to PDF. The question will only be asked if the document is allowed to be converted.



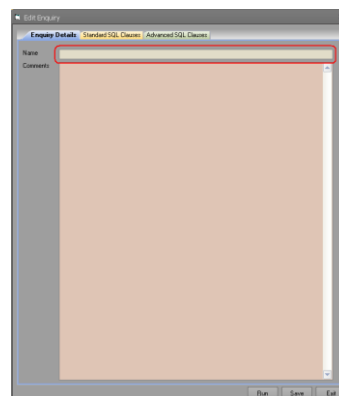
- 14) In configuring decisions to create matters, if users have set a matter creation template, unchecking the “Automatically create new matters using template” was not clearing the selected template. This is fixed on this release.



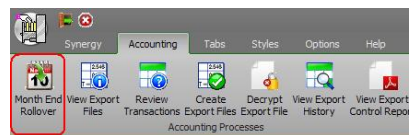
- 15) We have added a new method to our DataExtraction object for disposing an additional data row and all its client and matter references. This new method is called DisposeAdditionalDataRow and required the additional data table identifier as well as an additional data row identifier.
- 16) We have allowed sorting in the add/edit companies form. This may help those organisations that may have numerous company databases in their production environment.



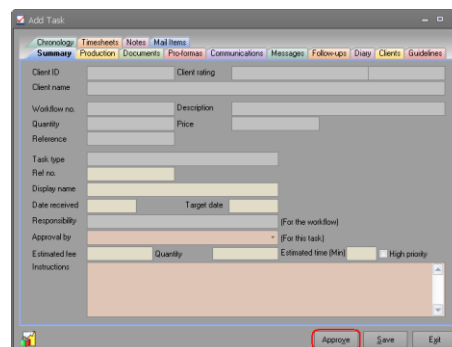
- 17) Synergy allows multiple sub-queries to be stored for a query. In the previous versions, the Synergy was insisting on unique names for each sub-query. We have changed this and enforced uniqueness of names for sub-queries within a single query only. This should allow two queries to have identical names for their sub-queries.



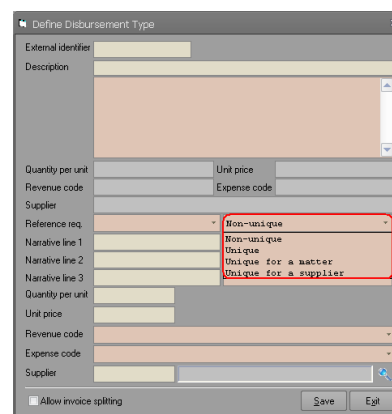
- 18) In previous versions, we allowed mandatory profiles to be set for client addition. In some cases, profiles may only contain a single option. In these instances, there is no point in prompting the user for profile selection because there is only one option. We have changed Synergy so that any profile with single active profile category is automatically selected for the user without any prompts.
- 19) Added the end o month rollover process to the accounting tab in the ribbon bar. Please note that this button will only be available when the accounting tab is visible and the user is in the security group that can perform the end of month rollover process. This process was only accessible from the timecost tab of the housekeeping form in previous versions.



- 20) Fixed a bug in task approval process. In cases where the approval of a decision was creating other decisions, the task edit form was approving the decision but was not processing the other newly created decisions that were marked for immediate processing. This bug is fixed on this version. Processing the newly created decisions marked for immediate processing is the only behavioural change that you should observe.

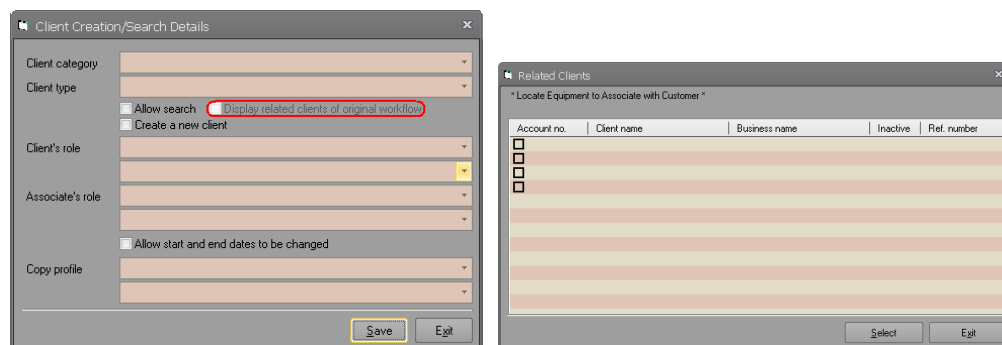


- 21) We have provided more flexibility in terms of checking the uniqueness of disbursement reference number. Uniqueness can now be enforced within disbursements for a matter or for a supplier.

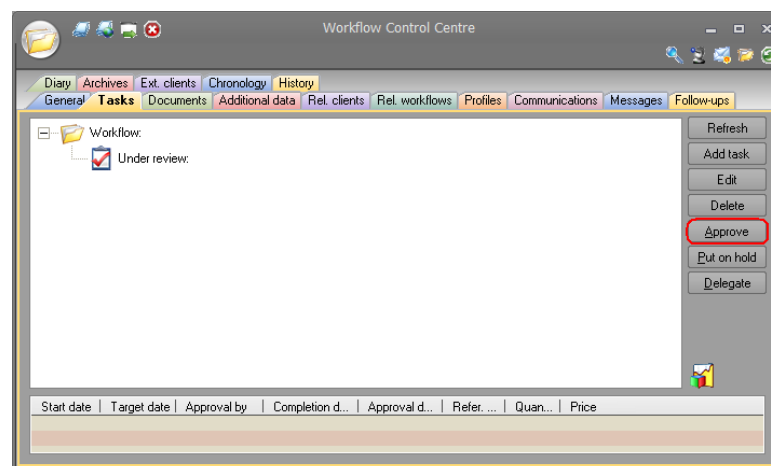


### *Modification as at release 10.00.14*

- 1) Synergy allows new matters created from decisions. It is also possible to create associations when these new matters are created using data capture question that are processed immediately. In many cases, it will be useful to display the related clients of the original matter for creating these associations. Imagine an organisation that has sales matters and as part of a sales process, they reserve items for sale by relating these items as related clients to the sales matter. When the sales matter reaches a particular task, the matter is configured to create a delivery matter for each sales item. As part of the delivery matter, an immediately processed data capture question is configured to create an association between the item being sold and the primary client of the matter to signify that the item is sold to this customer. In this instance it would be very useful to display the related clients of sales matter because those items are the ones that are being delivered. Asking user to search for the same item using the client search form is not really as user friendly as it could be. If the user exits the related client form rather than selecting related client (indicating that the required related client is not there), the normal client search form will be displayed. Please note that when a related client is selected, it will be eliminated from the subsequent lists. Below you see an example of selecting equipments for associating to a customer.



- 2) We have allowed the under review task to be approved from Matter Control Centre.



- 3) We have added ability to search for clients marked as web user from the client search form. This has also been added to the client search class in our Software Development Kit library.

The image shows two versions of the 'Client Search' form. The left version is the 'General search criteria' tab, and the right version is the 'Additional data search criteria' tab. In the right version, the 'Marked as web user' checkbox is highlighted in red.

- 4) We have amended the client add/edit form to allow web users to be processed. Please note that you will need to set up proper security groups to allow users in creating/modifying web users.

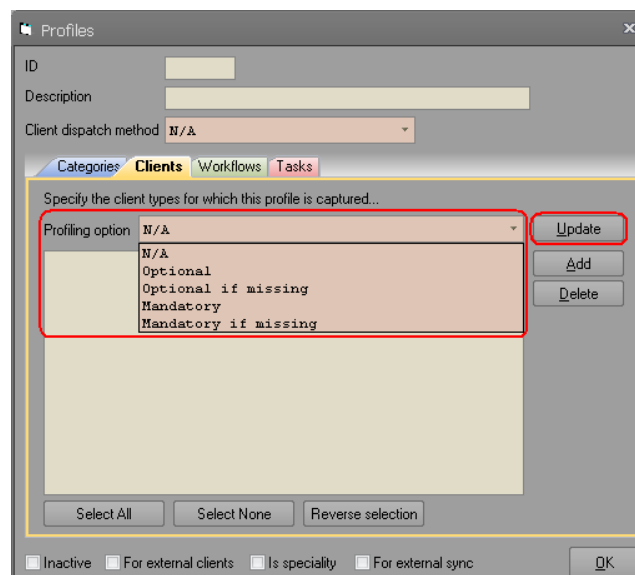
The image shows the 'Maintain Client' form. The 'Web access' checkbox is highlighted in red.

- 5) Our web user licensing model has now been implemented in Synergy and Software Development Kit. If you are thinking of using Software Development Kit to provide interface to Synergy database to your clients, please contact us for client runtime licensing. If you have licensed our Software Development Kit and have not been issued with a developer key, your license server application will need a new activated license file. Please contact us and we will provide you the required license file and activate it for you.

The image shows the 'Site License Details' form. The 'Allow web access' checkbox is highlighted in red.



- 6) Some customers have asked to provide facility to enforce profiling of clients when they are created. Although this can be done when the profile is known using templates, in many cases, the profiles are unknown to the administrators or the number of profile categories are too many that creating a template for each is not practical. We have amended Synergy and provided facility for profiling of clients. When profiles are linked to client types in the profile edit form, administrators can now specify an option for the profile and client category combination. For now, we have provided 5 options as can be seen from the image below. N/A option simply indicates that profiling of client category is not required. Entries containing the word “Optional” indicate that selection of the profile is optional and should not be enforced. Those with containing the word “Mandatory” indicate that the selection of profile is enforced. Please note that those containing the word “missing” is for future use and will not be considered by client creation because when creating a client, there will be no profile and hence there is no point in checking their existence. Administrators can use the update button to alter setting for the existing client categories.



- 7) With addition of the above facility, we have altered our client object in Software Development Kit to allow users to profile the client when they are created. A new method called “**GetClientCreationProfiles**” has been added to the client object. Applications developers should call this method to get a list of profile categories that are configured for the client category. They will then need to get the user to select the required profile types and delivery methods using the categories that have been defined. All selected profile type identifiers and delivery methods should be passed to the client object using “**SetClientCreationProfiles**” method. Please note that there should be a one to one correspondence between the profile types and delivery methods, that is, both collections must have identical number of entries. The profile type collection should only contain the primary key for the selected profile types. You must repeat this exercise every time you change the client type details. The library will automatically destroy these collections if the client category is changed in anyway. It will also check and ensure that at least one profile type from each mandatory profile category is present in the profile type collection

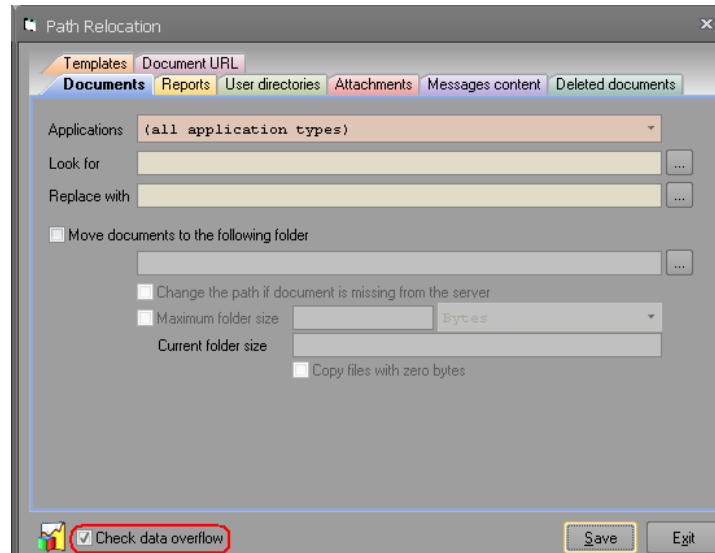
passed to the library. We have also altered Software Development Kit test application to demonstrate how this could be handled. Please review the code in our sample application.

- 8) A few versions back, we introduce a feature that allowed users to type client names in account number fields for searches. This feature was not working in the matter search form on primary and related client field. This bug is fixed now.

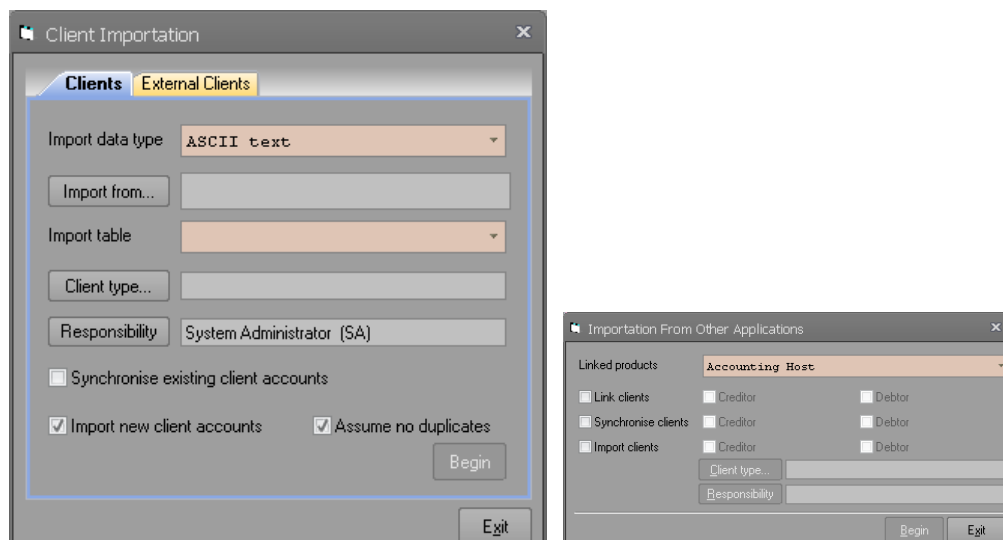
- 9) We have added a new setting that allows sites to configure whether Synergy should fill the last two columns in the matter tab of the Client Control Centre as well as determining the hold status from the tasks. When this setting is turned on, the PCT% and reason columns will be left blank and the status column will only display active or inactive depending on the presence of the matter completion date.

- 10) Given that the field sizes in the database are limited, it is possible that administrators simply forget to check the existing data before they attempt at

relocating files through document path relocation form. To assist them, we have added a check box to this form that allows you to let Synergy check the existing data and ensure that by relocating the documents to a different path, the new path will not overflow the field in the table. If this check box is unticked, then you will be asked to confirm that you have checked this beforehand.

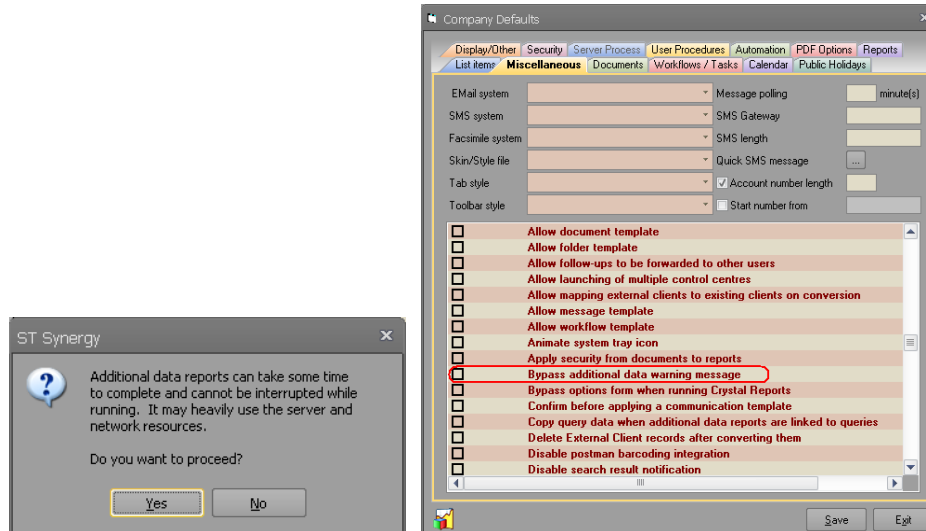


- 11) We have amended the client importation form, importation from accounting and tax systems to ask for client profiling if imported clients types are configured for profiling during addition. Please note that the selected profiles will be applied to all imported clients. This will avoid having to ask for profiles for each client. Please note that these forms are only available for Derrington Holdings Pty LTD consultants and is not available for general public.

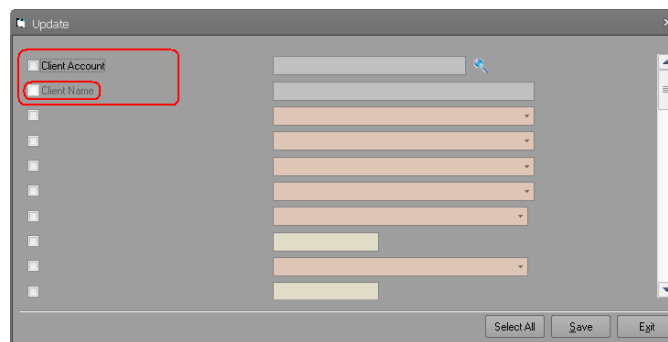


- 12) There was a bug in manipulating the trusted user list from the right mouse pop-up menu. This bug is fixed now.

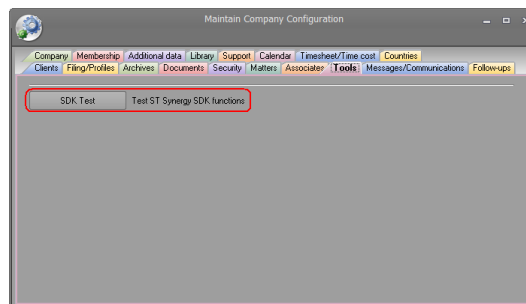
- 13) When running additional data reports, Synergy usually warns user that the report may take a long time to run. A number of clients have asked us to remove this warning. However, to cater for those sites that would like to keep the warning, we have created a new setting that allows sites to bypass this warning if they wish to.



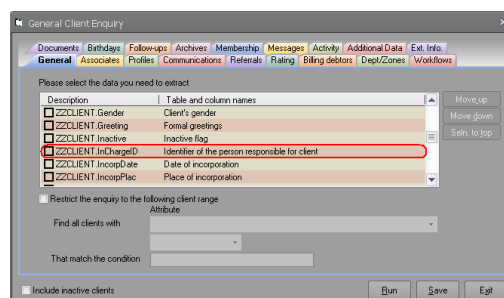
- 14) A few versions back, we allowed additional data columns to be grouped and considered as one entity. When additional data columns are grouped, a search button was only displayed for the group header to allow user to search for data. When updating additional data, a check box is added to the additional data form next to each item which allowed user to define which items are to be updated. In cases where fields being grouped together, it is possible for users to forget to click every check box for every field in the group. It could also be difficult for a user to know which fields are exactly grouped together specially if the group members are scattered on different location in the additional data form. In this version, Synergy will disable the check boxes for group members and will only leave the check box for the group header enabled. When the checkbox in group header is checked/unchecked, then Synergy will apply the action to all other members of the group. Given that the command button was always enabled, users usually click on the button and select the data without ticking the check box. Consequently, no updates would be performed since the check boxes were left unticked. To assist users, we have disabled the command button until the check box is ticked.



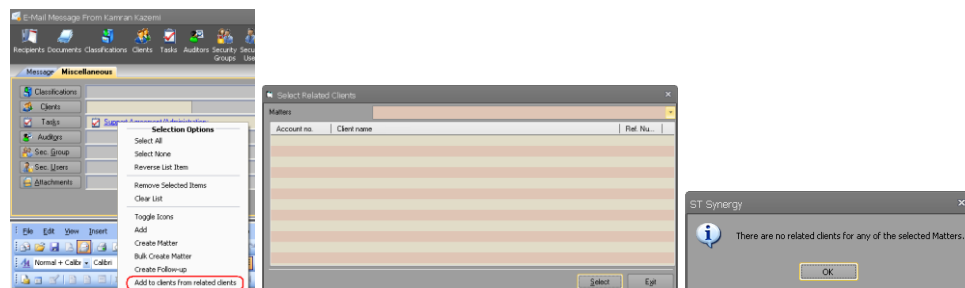
- 15) When reversing a decision, any decisions existed under the task that you were reversing would be deleted. However, the milestone table was not being cleaned up during the reversal process. The consequence was that if the user takes the same answers and creates the same nodes, the milestone would not be correct. In this version, the decision reversal will clean the milestone table and this should fix the milestone discrepancy that may have occurred in the past.
- 16) Fixed a bug in disbursement type edit form. The bug was caused by invalid value being used for the form height.
- 17) We have noticed that some customers have started using the tools that Derrington Holding Pty Ltd has developed for use by its own consultants. These tools, which are mainly located on the data transfer and support tab of the Housekeeping form, are developed to assist company consultants in rolling out new sites and should have never been used by our customers despite their availability through user interface. To stop this unauthorised use, we have moved all such tools into the support tab and have secured it with a new private password which will change on every new version. There was only a single button called “SDK Test” that should have been used by our customers who had license for Software Development Kit. In order to provide continuous access to this button, we have moved it to the old data transfer tab and called the tab “tools” tab which is accessible publicly. Any publicly accessible tools will be added to this tab in the future. Support tab is exclusively for use by Derrington Holdings Pty LTD’s consultants and are not to be used by our customers.



- 18) In ad-hoc enquiry form, when selecting ZZCLIENT.InChargeID as an output column, Synergy will automatically add the name and external identifier of the person responsible (ZZUSER.ExtUserID and ZZUSER.Name) to the output column list. Also fixed a bug when this form was being loaded from company defaults for setting default output columns.

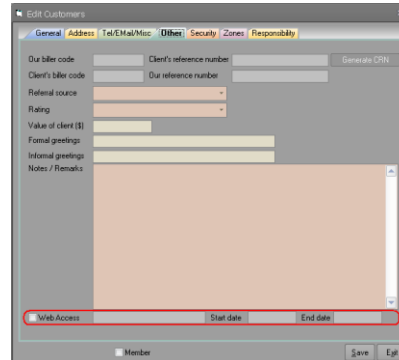


- 19) When notifying users from a communication, the subject of the message contains the name of the client that communication is logged against. However, there is no indication of who the staff member has spoken to unless s/he actually notes it in the body of the communication. To assist people, we have changed the subject line of the notification message from communication to “Contact with XXX (Re: YYY)” where XXX is the name specified in “Their contact” field and YYY is the name of the primary client of the communication.
- 20) When creating a message, sometime users may want to add a client from the related clients of the matters lists in the task list. There was no easy way to do this in the previous versions. We have added a new option to the popup menu of the task to allow selection of the related clients from the matters. When selected, all matters from the selected tasks will be passed to the selection form and listed in a drop down if they have related clients. The default matter will be the matter for the highlighted task. If there are no tasks highlighted, the first matter (the one with minimum matter number) will be selected. When matters are selected from the drop down, all the related clients of the matter will be listed and user can multi-select the entries and add them to the client list of the message. If there are no related clients for any of the selected matters, the user will be notified.

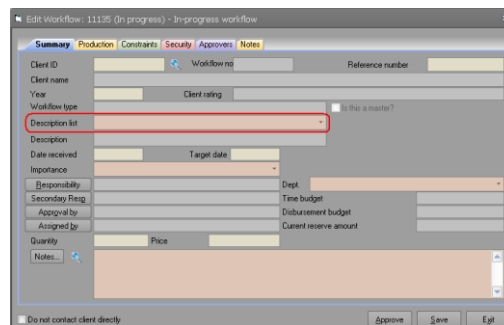


**Modification as at release 10.00.13**

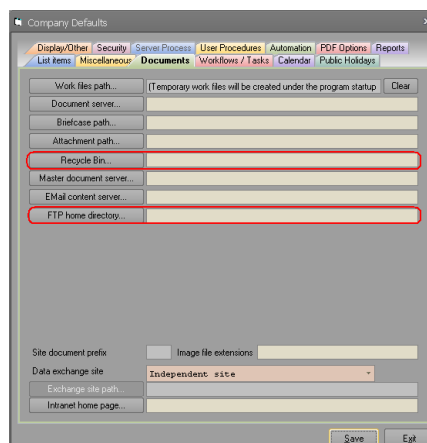
- 1) In the previous versions, web password and duration could only be stored for staff, individual and student base type clients. From this version we have extended this to company, other, trust, partnership, supper fund and association base client types.

The screenshot shows the 'Edit Customers' dialog box with the 'General' tab selected. The 'Web Access' field at the bottom is highlighted with a red box. Other fields include 'Our title code', 'Client's reference number', 'Generate PIN', 'Client's title code', 'Our reference number', 'Referral source', 'Rating', 'Value of client (\$)', 'Formal greetings', 'Informal greetings', and 'Notes / Remarks'.

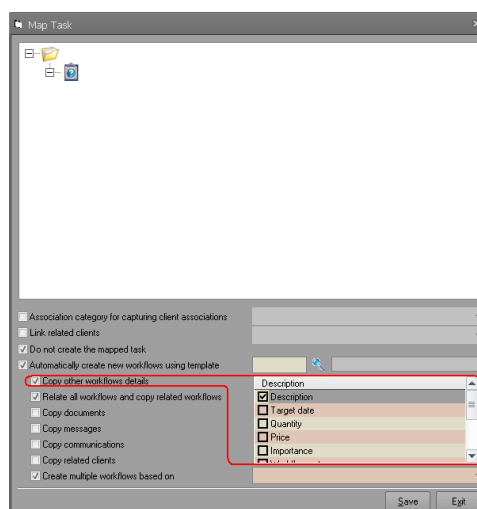
- 2) We have fixed a bug in validation of matter descriptions when they are linked to library text. The descriptions for each library text category are sorted by the short description and this was causing some issues. In rare occasions, it was possible for the wrong entry to be selected because of partial matching.

The screenshot shows the 'Edit Workflow' dialog box with the 'Summary' tab selected. The 'Description list' dropdown menu is highlighted with a red box. Other fields include 'Client ID', 'Reference number', 'Client name', 'Year', 'Workflow type', 'Client rating', 'Is this a master?', 'Description', 'Date received', 'Target date', 'Importance', 'Responsibility', 'Dept', 'Secondary Resp', 'Time budget', 'Approval by', 'Disbursement budget', 'Assigned by', 'Current reserve amount', 'Quantity', 'Price', and 'Notes'.

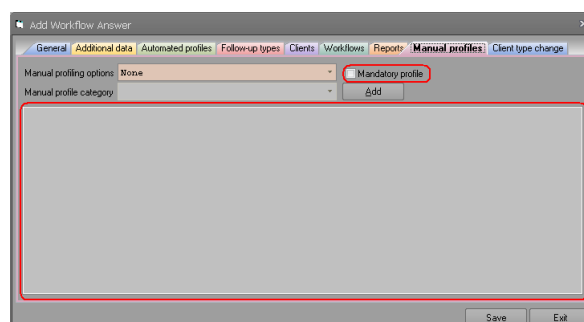
- 3) In previous versions, when FTP home directory was being specified, an administrator could not leave the recycle bin document repository blank. Given that the recycle bin is not a mandatory requirement for Synergy, we have amended the code to avoid this validation.

The screenshot shows the 'Company Defaults' dialog box with the 'Documents' tab selected. The 'Recycle Bin' and 'FTP home directory' fields are highlighted with red boxes. Other fields include 'Work files path...', 'Temporary work files will be created under the program startup', 'Clear', 'Document server...', 'Briefcase path...', 'Attachment path...', 'Master document server...', 'Email content server...', 'Site document prefix', 'Image file extensions', 'Data exchange site', 'Exchange site path', 'Intranet home page', and 'Save' / 'Exit' buttons.

- 4) In previous versions, when creating new matters as part of a decision, the only information that could be copied from the existing matter to the new matter was the matter description. From this version onwards, we have made this more flexible by allowing some other information to be copied. In the task mapping form, we have added a new list view that displays the information that can be copied from the existing matter to the new matter. Please note that at the database level, a new field CopyMData which is a bitmask representing the selected information will replace the existing CopyDesc. If you have any reports relying on CopyDesc field, please change your reports to use CopyMData field. The list position of the information represents the corresponding bit in the CopyMData value (bit positions starts from zero). As part of upgrade, bit zero will be set to 1 for all those decisions that was set to copy the matter description.



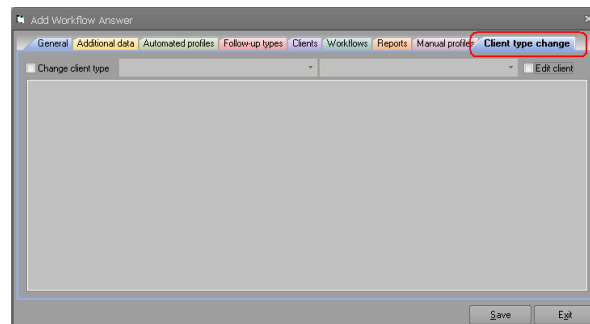
- 5) Synergy has provision for manual profiling of matters as part of decisions. However, a single profile category could be selected. This means that when there are requirement for multiple manual profiling, multiple questions may needed to be configured. Also, Synergy was treating manual profiling optional and in some cases, administrators may want to make these profiles mandatory. From this version onwards, we have allowed multiple profiles to be stored for answers. We have also allowed administrators specify whether the profile should be mandatory.



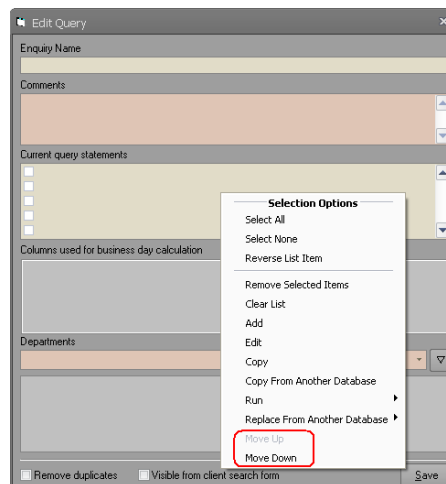
- 6) As part of decisions, one can set Synergy to change the client type. However, this was restrictive in a sense that there were no exceptions. A side effect of this was that all clients would have been converted and this may be



undesirable. There may be cases where a site would want to change a client type only if the client does not match a list of valid client types. We have introduced an exception list for client type change. From this version onwards, when exception list is configured, only the type of matter primary clients that is not one of the types specified in the exception list will be changed. We have created a new tab in the answer edit form for this purpose and moved the client type change drop down and edit client check box into this new tab.

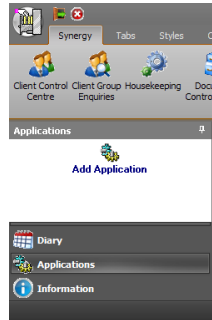


- 7) In previous versions, the stored queries were sorted by their internal primary key. This was OK as long as one creates the queries from scratch. Even then, if order of queries needs altering, one had to delete the queries and recreate them in the correct order. In this version, we have introduced sequencing for stored queries. Use the popup menu to move the query part up or down the list. Execution sequence of queries has also been amended to use this new sequencing. Importation and export of queries will now include the sequence number in the resulting database. Please note that if you have exported queries from previous versions and importing them into this version of the product, the queries will be sorted by the primary key since there will be no sequence number in the exported database.

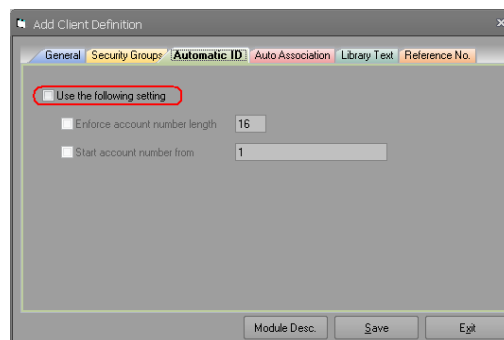


- 8) Synergy allows users to define applications that get listed in the applications side bar. In the previous versions, applications attached to the user were the only ones that were listed in the side bar. With this approach, when a site require to add the same application to a whole team, the application as to be defined for each member of the team. This is too much maintenance

especially for large teams with tens or hundreds of members. In this version, Synergy will display the applications defined for every team that users is a member of. Please note that when a team defined application has the same description as an application defined for the user, the team application will be added. In short, do not define application with identical descriptions at multiple levels which will be confusing for the user as well as administrator.



- 9) We have fixed a bug in copying documents through FTP in our Software Development Kit.
- 10) There is a check box in the “Automatic ID” tab of the client type edit form called “Use the following setting”. This check box was meant to dictate whether the setting from the client type or the housekeeping setting should be used for automatic account number generation. The Software Development Kit was certainly adhering to this setting but the user interface was not. We have changed the Synergy application so that this check box is honoured. You will need to review you client types and turn this setting on should you wish to use the client type setting for automatic account number generation.

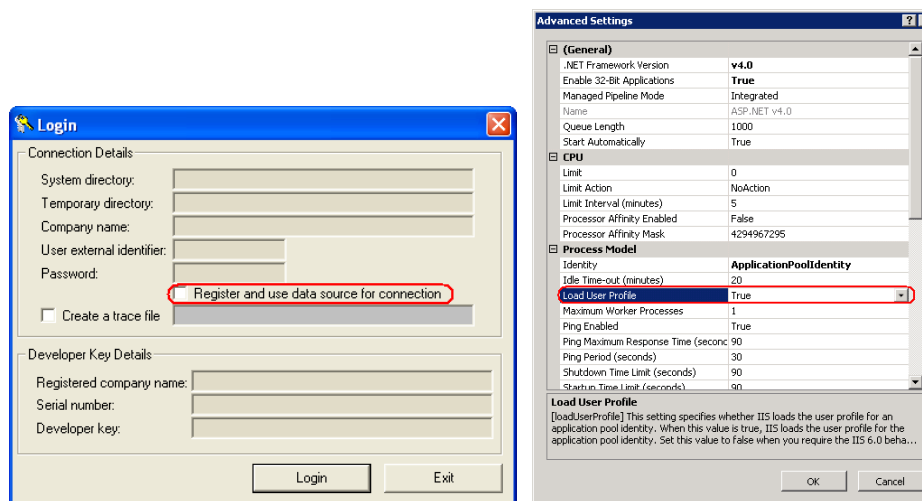


- 11) We discovered a bug in change classification form related to changing/adding classifications to templates. This is fixed now.
- 12) We have added a WebUserID property to user object within our Software Development Kit library. This property will provide the internal primary key of the ZZCLIENT table for the web user.
- 13) We have added the following properties to workflow item object within our Software Development Kit library:

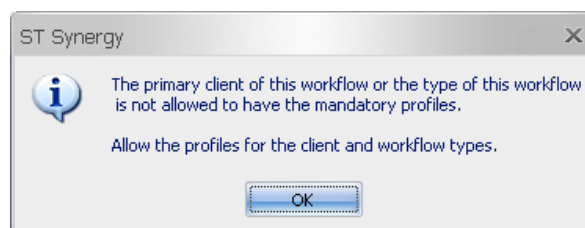
GetAdditionalDataRows	In workflow item object
ModifyAdditionalDataRow	In workflow item object

- 14) When Software Development Kit is used by a web application, the application pool that is used to run the application has to be set up to load user profile.

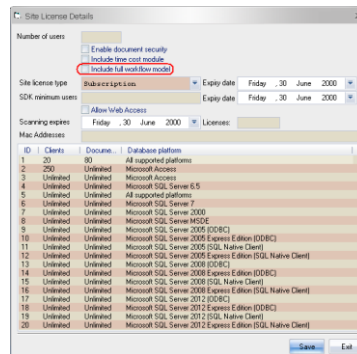
This is enforced because Software Development Kit library is registering a DSN for connecting to the database. Some administrators may not want to set the application pool to load user profile. We have added a new property to the database object in our Software Development Kit library called UseDataSourceNameForConnection. To preserve the previous behaviour of the library, we have set the default to be true. However, by setting this to false, a DSNless connection will be established to the database. We have also amended the Software Development Kit test application to read this new property from the INI file. The key is called UseDSN and should be located under the Connection Details section of INI file. The values can be set to YES or TRUE if DSN is required. All other values will create a connection without DSN.



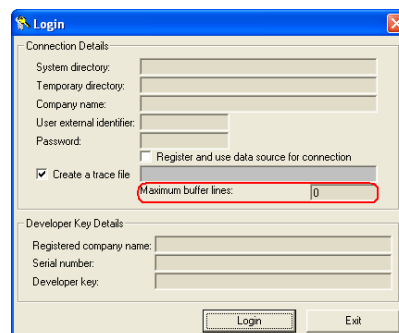
- 15) We introduced a mandatory flag for manual profiling of matters as part of processing workflow decisions. One side effect of making a manual profile mandatory is that the user will not be able to exit out of profile selection form without selecting a profile. This is well and good as long as the profile form displays a profile for selection. In cases where a user has created a matter against the wrong client, it is possible that profile form would not display any profiles because the mandatory profile is allowed to be added to the client type. In this case, the profile form will be displayed but because the mandatory profile is not allowed for the client type, the drop down of profile categories will be empty. We have added a validation to the approval process of decisions that will check all mandatory profiles and if any of the profiles are not allowed for the client or matter type, it will warn the user and stop the approval process. The following message will be displayed in this case.



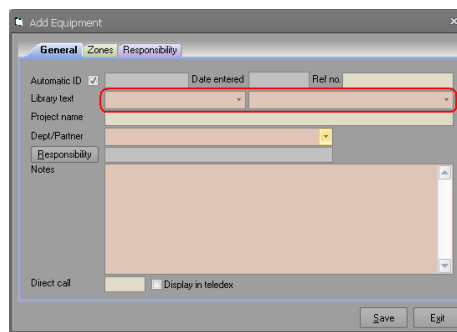
- 16) Our Software Development Kit was not validating the full workflow licensing indicator from the start-up database. We have added this validation to this version.



- 17) Our Software Development Kit was not allowing client activity status change when adding a new client. We have removed this restriction on this version. You can use the `ClientActivityStatus` property or use the `ChangeClientActivityStatus` method to change the activity status. Please ensure that you check the error object after setting the property or calling the method in case, the activity status change was not permitted. If validation fails, the activity status will remain unchanged.
- 18) In our Software Development Kit, when an application developer requests creation of log file, file gets created and opened when `LogFileDetails` method is called and the file remains open until the library is reset or the `LogFileDetails` method is called with a blank file name. A side effect of this approach is that file size could be limited by VB runtime environment to approximately 64K. Application developers have asked us to provide a mechanism to ensure these log files could be as large as required. We have added a new property called `LogFileBufferLength`. Application developers could use this property to specify how often the log buffer should be flushed to disk. Log line counting starts after this property is set to a non-zero value and stops when this value is set to zero or log file is closed. The value of this property persists across different log files. The only way to alter this value is by setting the property again to a different value. Obviously the best value for buffer limit is 1, if there were no overheads, where every log record is flushed to the disk immediately. However, flushing the data to the disk has overheads and application developers should always use their experience in setting an appropriate value. Please note that we have made provisions in our Software Development Kit test application for this new parameter.



- 19) In previous versions, we allowed client names and matter descriptions to be linked to library texts. Multiple library text categories could be selected for each client and matter category. When multiple library text categories are configured, it could be difficult for users to pick the correct entry specially when there are far too many entries per library text category. Given that the description of library text types are displayed in the drop down, these descriptions could also be identical on two different library text categories while the extended description could be quite different. In these cases, the user will be unable to pick the correct entry from the correct category since there was a single drop down for library text. In this version, we are displaying the library text categories in one drop down and the library text types in a separate drop down just like a normal two tiered system that it is. This will make it a lot easier to find the desired entry quicker when there are multiple categories.

The image shows a screenshot of a software window titled "Add Equipment". It has three tabs: "General", "Zones", and "Responsibility". The "General" tab is active. Inside the tab, there are several fields: "Automatic ID" with a checked checkbox, "Date entered" and "Ref no." text boxes, a "Library text" dropdown menu (highlighted with a red rectangle), "Project name" text box, "Dept/Partner" dropdown menu, "Responsibility" dropdown menu, and a "Notes" text area. At the bottom, there are checkboxes for "Direct call" and "Display in teledex", and "Save" and "Exit" buttons.

- 20) When workflow decisions were configured to put tasks on hold, it was possible for the tasks not to have a target date because they have just been created and the system may not be configured to auto-calculate the target dates from the creation date of the task. In this case, there is no way for Synergy to put these tasks on hold since there is no target date. There was a bug in the hold form that was attempting to process these tasks. We have added a validation to this form that will prevent this from happening. Any task that does not have a target date will be rejected. A message box will inform the user.
- 21) There have been major changes to our Software Development Kit library. We have implemented the decision approval in this library. Please look at our Software Development Kit test application and follow the events raised from the workflow item class closely. There are inline comments within all events and they explain why the event is raised and what is expected of the application developer.
- 22) We have implemented the decision reversal in this library. Please look at our Software Development Kit test application and follow the events raised from the workflow item class closely. There are inline comments within all events and they explain why the event is raised and what is expected of the application developer.
- 23) Many sites may configure task sequence number to indicate the year that task was created. There is a task sequence starting number in company defaults that allows sites to do this. However, we have noticed that some forget to change this number when a new year arrives. To assist sites with this, we have added a new setting to the housekeeping form that allows sites to specify

that the task sequence starting number should always be set to the current year. In this case, Synergy will use the date of the database server to set this value.

- 24) Approval of the task from the task tab of Matter Control Centre was overwriting the task completion date. This behaviour was different from approving the task from the task edit form. We have fixed the approval process from the task tab of the Matter Control Centre to behave similarly to the approval from the task edit form.

- 25) Added a new event to the master workflow object in Software Development Kit to allow processing of immediate decisions after workflow creation (at the end of the call to CreateWorkflowItems method). The event will be raised by the master workflow object, once for every created workflow. A collection of all decisions (task identifiers) that are marked for immediate processing will be passed as event argument. Developers should loop through the collection of task identifiers and use all existing functionalities in the Software Development Kit and approve each of these decisions. Should developers want to abort this process, they can do so by setting cancelation event argument to true. Having done that, the library will not raise any more events for any of the remaining workflows. The workflow creation method call, CreateWorkflowItems, will successfully return regardless of the outcome of decision approval process.

**Modification as at release 10.00.12**

- 1) In previous versions, users could select library text using a two tiered parent and child selection form or using a free text search form. Each of these forms was loaded using a different search button. Free text search usually were invoked using a button with magnifying glass in various forms. An example of these buttons can be seen in the communication form. We have combined these two forms into a single form allowing both types of search to be done from a single form should user want to. Please note that although both buttons remain in the forms, we will be removing the free text library search button from all of the forms in the future releases.

Communication Form

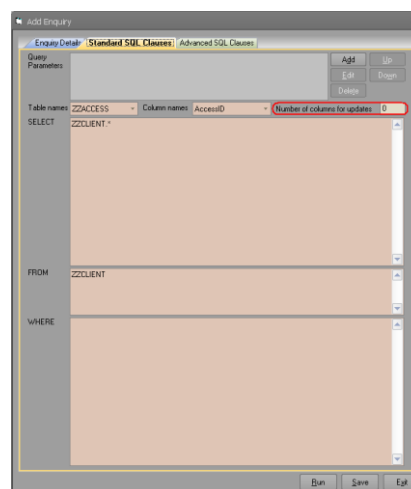
Parent/Child Search

Free text search

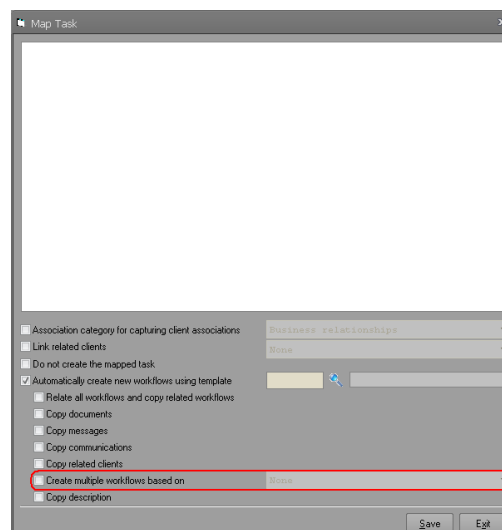
Combine Search Form

- 2) We have increased the size of the library text external identifier as well as the description. The external identifier has been increased from 5 to 16 and the description from 25 to 50 characters.

- 3) In previous versions, a user may develop a group of queries in one stored query for a specific report. All queries in the group were insert only queries, that is, Synergy would have executed each individual query in the group and the result would have been added to the RRESULT, target table for reports. However, in many cases, it is highly desirable to allow some queries in the group to update existing data in the report table. This could allow users to create much smaller tables for their reports. In this version, we have allowed users to indicate whether an individual query in the group will add data to the report table or will be used to update existing data. We have provided a new field that allows users to indicate how many columns Synergy should use for matching purposes when updating existing data. Please note that Synergy will use the specified number of columns starting from the first column in the query. Please note that the columns used for matching as well as those required updating should have identical name and type.



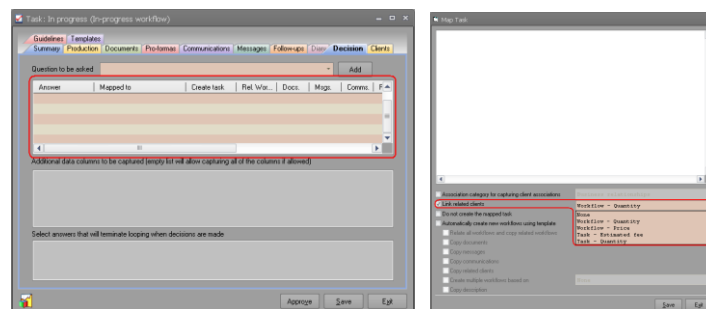
- 4) We have fixed a bug in the task mapping form. In this form, the matter creation option from the dropdown was always being saved regardless of the check box status.



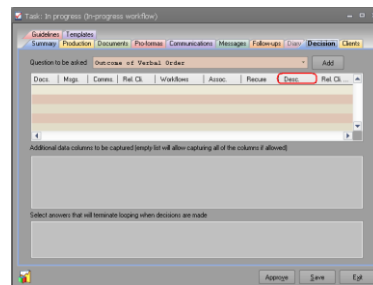
- 5) Synergy allows matters to be created when decisions are made. Furthermore, it is possible to use the estimated or actual fee from the matter or task to



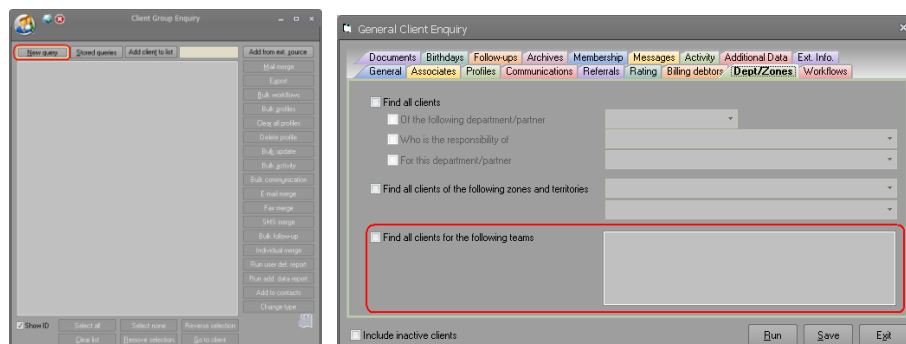
indicate the number of matters that needs to be created. In some cases, it may be useful to provide a similar facility as above for relating clients. Imagine a sale based environments. In these environments, a sales process may exists and as part of this sales process, a user may want to allocate/reserve a specific item of equipment that is being sold as part of that particular sales process. The existing Synergy feature allows a client to be related to matter but at the same time associated to the primary client of the matter. An added drawback of this facility is that the number of related clients cannot be restricted as may be required by the sales process. In this version, we have provided this facility for users. This facility can be set when mapping answers from the task form. Please note that Synergy will prompt the user for the number of related clients that are required. This process will ignore the selected clients that are already linked to the matter. All the rules related to linking related clients to matter will be checked before they are linked.



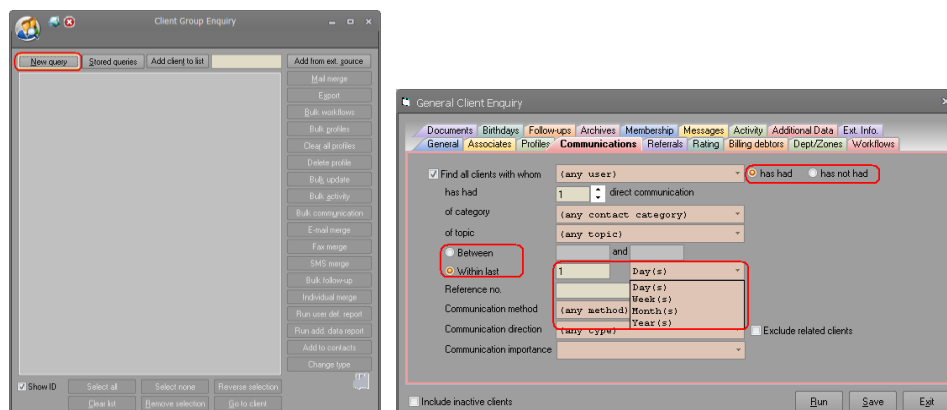
- 6) The copy matter description option was not being displayed in the list view of the task form. We have added this column to the list of columns displayed in the decision tab of the task edit form.



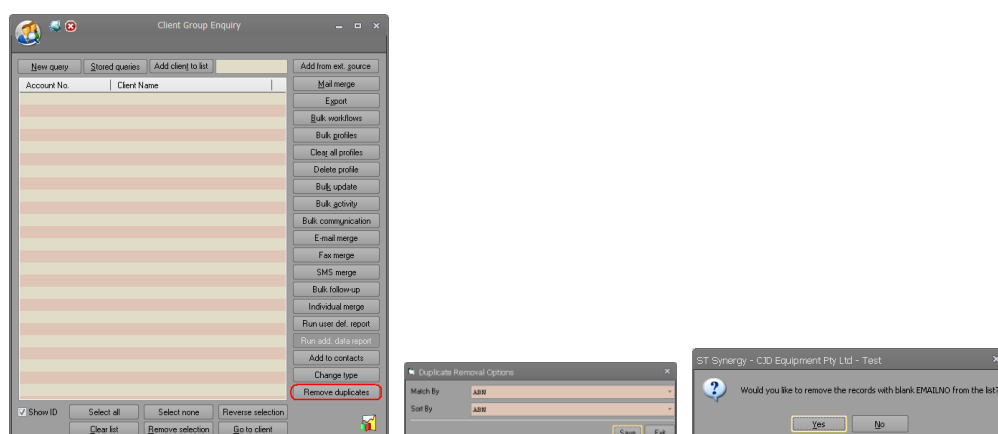
- 7) We have added ability to search for team members in the new queries form. Users can select multiple teams should they wish to.



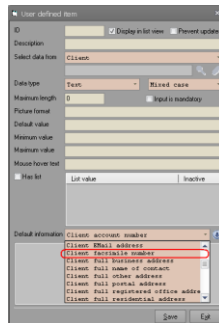
- 8) Sometimes, users may need to know whether a client has been contacted in the last say 6 months. Despite the fact that communications were stored in Synergy, the new query form was not allowing to do such queries. We have added this facility to the communication tab of the new query form. Using “has had” and “has not had” radio buttons, users can search for existence or non-existence of communications. Using “Between” and “Within last” radio buttons, users can search for a set date range or look for communication within a set period from the current date.



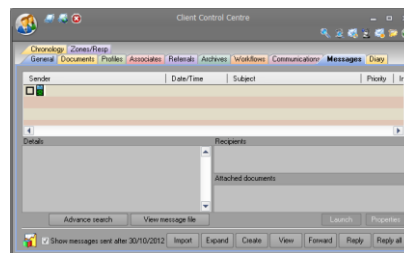
- 9) In many cases, users may have built a result table in the Client Group Enquiry by running multiple queries. The user may want to remove records that have duplicated records on a certain fields. For instance, imagine that you would like to build a list of all your clients and perform an email merge. It is possible for you to have multiple contacts in an organisation with the same email address (e.g. support or info email addresses). You certainly would not want the email to be sent to the same email address multiple times. To provide a mechanism to remove duplicates from the Client Group Enquiry result table, we have added a remove duplicate button. When removing duplicates, you must specify which column in the result table should be used for duplicate detection and which column should be used for sorting records within the same matched column. Once the columns are selected, you will be asked what should be done with fields with no data and whether Synergy should leave them in the dataset or removed them. Please note that records are sorted in ascending order.



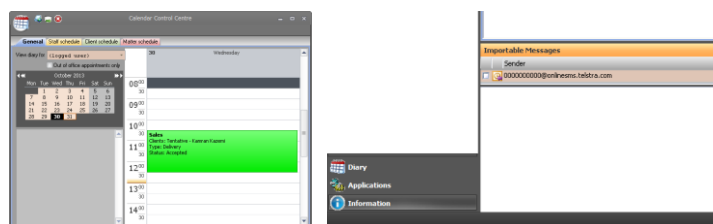
- 10) We have added the client fax number to the list of basic information that could be filled in for additional data and document replacement symbols.



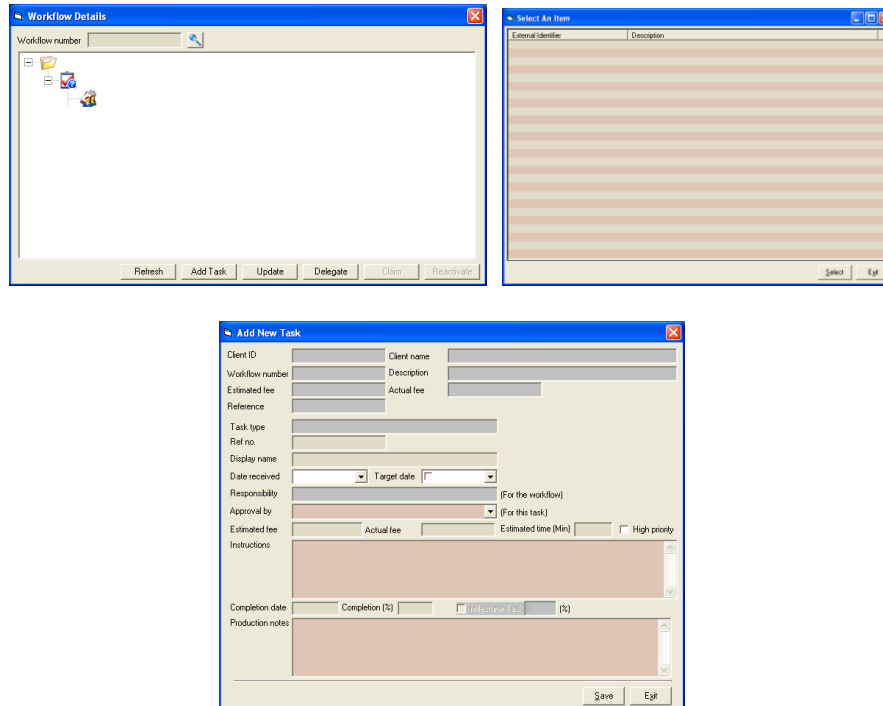
- 11) Synergy provides SMS facilities for informing your customers of the appointments they may have. It uses online SMS services such as Telstra's online SMS service. These online services provide facility for the replies to be returned to a specific mail box. In Synergy, when these SMS replies were being imported, they were considered as emails not SMS. We have fixed this on this version.



- 12) When importing SMS replies, if these replies are confirmation of attendance for an appointment, it would be desirable for the imported SMS replies to take the characteristics of the appointment that they belong to, in terms of clients and matters. Doing this in the past was very time consuming. In this version, we have allowed SMS replies to be dragged and dropped onto an appointment in the Calendar Control Centre. When this is done, Synergy will match the mobile number to a client in Synergy and if it finds the client, the imported message will be attached to the matched clients. Synergy will also attach the message to the clients and matters of the appointment. It will ask the user as to whether this SMS reply is a confirmation of attendance and if so, any client of the appointment that is matched to the mobile number where SMS reply is originated from will be marked as accepted. Synergy will format mobile numbers using Australian format ( "XX XXXX XXX XXX"). Any number greater than or equal to 10 characters in length will be formatted and those with less than 10 will be left unformatted.



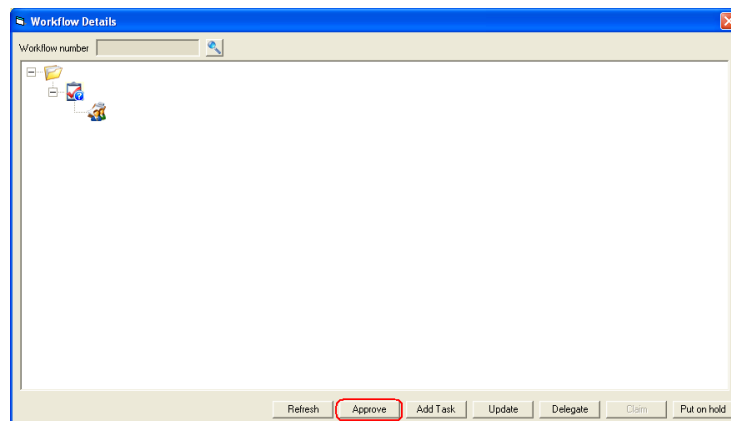
- 13) We have included ability to create tasks from our Software Development Kit. To test this feature you can use the “Add task” button from the workflow details form. When you click the button, you will be prompted to select a task type and once the task type selected, the task add form will be displayed. Please note that this is just a simple facility to create the task itself. There are no provision to related/import documents, clients etc as you see through the user interface. These facilities may come in the future.



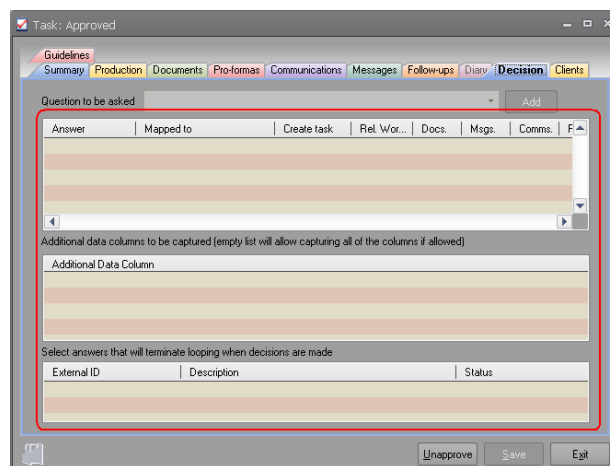
Please look at the source code in the test application. To add a new task, you would need to call CreateNewTask method of a workflow item class with the required task type as a parameter. You would also need to pass a task object as the parent task. If you are creating a top level task, that is, a task directly under the workflow itself, then pass Nothing (in VB) to this method. This method call will return you a clsSTSDKWorkflowTaskInfo class. You can use various properties and methods of this object to fill in the information. You can then call the CommitNewTask method to commit the task to the database. Please note that you can only create a single task within each workflow class. If you want to cancel the current task addition process, you need to call the RemoveNewTask method of the workflow class. Please code for ActualFeeConfirmation, EstimatedFeeConfirmation and MilestonePercentageExceeded events. These events are designed to warn the user about certain conditions. In some cases, these conditions require user input and in some cases it may just be a warning that may need to be displayed to the user. For example, MilestonePercentageExceeded will be fired when adding a milestone task causes the total percentage for the workflow to exceed 100%. In this case you may want to warn the user and depending on the user's response, either continue the process or stop it.

- 14) We have added the ability to approve non-decision tasks to Software Development Kit library. Please note that a number of events will be triggered as part of this process. For example, all of the events that are triggered as part

of activating an on hold task will also be triggered as part of approving a task should the task that is being approved be an on hold task. In addition to that, a number of other additional events will be triggered by the code. These events closely follow all the events that occur during task approval process from the user interface and are necessary part of task approval process. The Software Development Kit test application has been extended to include this process. Please inspect the task approval process in this test application and follow the instructions there. Please note that the whole approval process is wrapped in one database transaction. So you would need to ensure that your implementation does not cause locking contention at the database server in a multi-user environment.

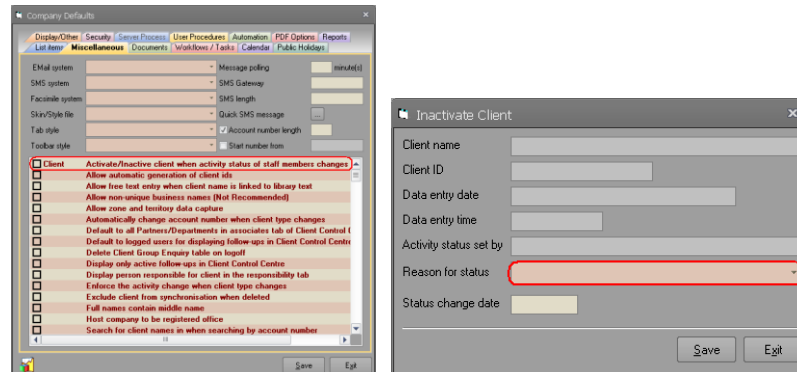


- 15) It is sometime handy to look at the decision mapping on a master task when the master task is approved. In the previous versions, one would have had to activate the task before these lists were enabled. In this version, we have enabled the list boxes on the decision tab of the task form regardless of task status.

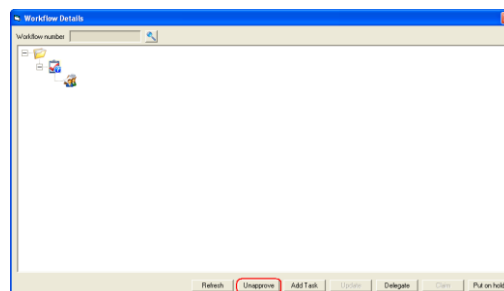


- 16) When activating and inactivating staff member, it would be ideal if the client record linked to the staff member also be activated and inactivated. In the past, these were two separate processes and users often inactivate a staff member but forget to inactivate the client record. In these cases, the client and user records quickly get out of sync in terms of activity status. To assist our clients, we have added a new option to the company defaults to allow the

client activity change form to be loaded from user edit form. In this case, the client activity status change form will only have the relevant options in the drop down. If the staff record has been inactivated, only activity reasons that inactivate a client will be present. When activating the staff member, the drop down will only have the reasons that activate the client record. The title of the form informs the user as to whether the client will be activated or inactivated.



- 17) Added ability to unapprove tasks from Software Development Kit library. Given that unapproval process is relatively less complex than approval process, we have allowed unapproval of decisions as well.




*Modification as at release 10.00.11a*

- 1) When placing a task on internal hold, the warning message was not informing the user that a follow-up was being created when it should have. The message box now includes this notification.


Place Task On Hold


Reason for hold-up


Hold task for ☒ business day ☐ calendar day


Comments 

Current target date Revised target date

Follow-up categories 

Follow-up type 

Follow-up due on 

Follow-up importance 

Save Exit

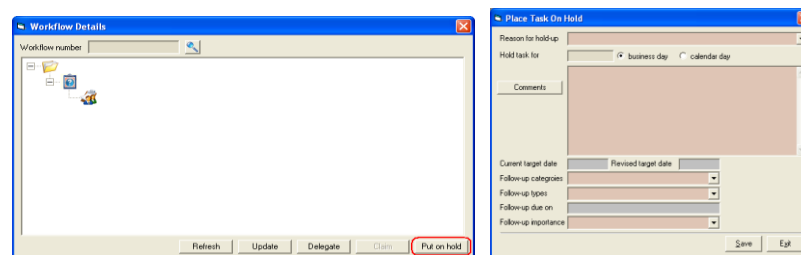
- 2) In previous versions, we introduced a setting that allowed sites to define what should happen to the matter description and whether the user should be able to manipulate this or not. We also allowed this setting to be used in decisions by having a check box in the task mapping form. This setting was not being copied from the decisions when one was duplicating a master matter. In a cut and paste operation on master matters, in addition to the above, the client association setting was also being ignored. These bugs are all fixed.

The screenshot shows the 'Map Task' dialog box. The 'Association category for mapping client associations' is set to 'Do not create the mapped task'. The 'Automatically create new workbooks using templates' checkbox is checked. Below this, a list of templates is shown: 'Copy documents', 'Copy drawings', 'Copy presentations', 'Copy related clients', and 'Create a table and form based on'. The 'Copy documents' option is highlighted with a red rectangle. At the bottom right, there are 'Save' and 'Exit' buttons.

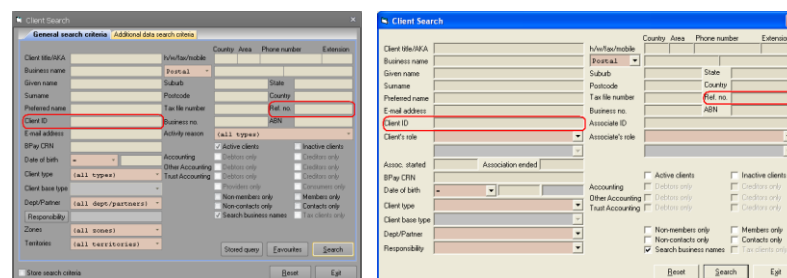
- 3) We have added a view security group to additional data. If a view security group is configured for an additional data, then users must have security to view the additional data before they can, add, edit or delete the additional data rows. We have also changed Synergy to only display the additional data tables that a user has access to in the additional data table drop down of the Client and Matter Control Centres. Software Development Kit has also been amended to follow the same rules.

The figure consists of two side-by-side screenshots of software interfaces. The left screenshot shows a window titled 'User Defined Table' with a tabbed interface. The 'Security' tab is active, showing three sections: 'Security groups for addition (use right mouse button for selection/deselection)', 'Security groups for modification (use right mouse button for selection/deselection)', and 'Security groups for deletion (use right mouse button for selection/deselection)'. Each section has a text area and three buttons: 'Add', 'Delete', and 'Insert'. The bottom section, 'Security groups for view (use right mouse button for selection/deselection)', is highlighted with a red rectangle. The right screenshot shows a window titled 'Client Control Centre' with a tabbed interface. The 'Additional data' tab is active, showing a 'Data type' dropdown menu, a 'Display data from workflows' checkbox, and 'Refresh' and 'Run report' buttons. The 'Data type' dropdown menu is highlighted with a red rectangle.

- 4) The server processes with the exception of the license server map a network drive to Synergy's system directory before connecting to the startup database during the restart process. This allows the connection to the network resource to be established before Synergy attempts to open the database. The server immediately disconnects the network drive. This process was not working as intended on Windows 7 Operating Systems. A DOS window was being displayed waiting for user input. We have changed this process to use Windows APIs and that has resolved this issue.
- 5) We have added the ability to activate tasks as well as placing them on hold in Software Development Kit. We have amended Software Development Kit test application to reproduce the hold form that is displayed from Synergy. If you are going to place tasks on hold through Software Development Kit, we strongly recommend you to follow the code in test application. There are a number of events that will be triggered as part of this process and you need to understand what each event means so that you can respond to them appropriately. There are plenty of inline comments on event handlers to allow you to familiarise yourself with these events. The task hold form in the Software Development Kit test application is identical to its counterpart form in Synergy in every respect including its operation.

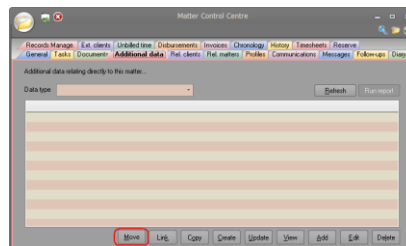


- 6) In many cases, the client search form is loaded with multi-selection enabled. When searching for multiple clients, in some instances, the clients may share some common data that will allow them to be selected easily in one search. However, in many cases, there may be no common attributes among the clients to allow uses to use a single search. In these cases, users may know the clients account numbers or reference numbers of these clients but given that the account and reference number fields allow a single entry, it is impossible to select all the required clients in one search. We have changed the client search form to allow entry of a comma separated list of account numbers and reference numbers. Please note that when you enter a comma separated list, an equality search will be used and all wild cards in these fields will be ignored. Our Software Development Kit has also been amended to provide the same facility.

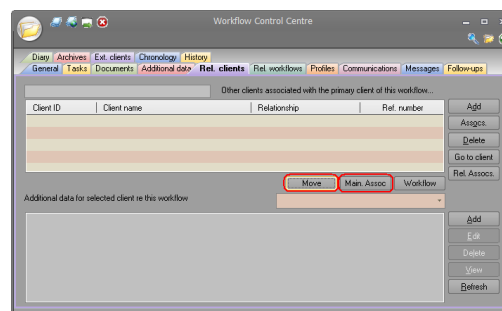




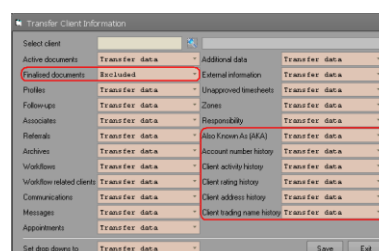
- 7) In some cases, users may want to move additional data rows from one matter to another matter/client. In this case, they will have to link the rows to the new entity and then delete the rows one by one from the matter. We have provided a move button that combines these two operations into one.



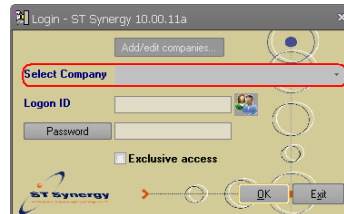
- 8) We have provided facility to move related clients from one matter to another matter from the related client tab of the Matter Control Centre. We have also allowed full maintenance of association for the selected client in the related client list from this tab as well.



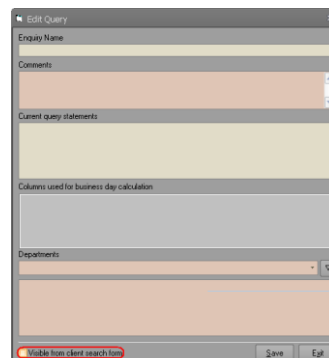
- 9) Importation of documents through our Software Development Kit was not validating the primary and related client lists. We have added validation for these. The primary client list cannot be empty and must have at least one client that exists in the database but the related client list can be empty. An error will be generated if these lists contain client identifiers that do not exist in the database.
- 10) Some clients have asked us to have the ability to transfer AKA history, account number history, client activity history, client rating history, client address history, trading name history and finalized documents when they are transferring information from one client to another client. We have added these options to the transfer process. Please note that when transferring account number history, client activity history and client rating history, the current record from these tables will not be transferred. Please note that for finalized documents, they will be reactivated, transferred and then finalised with the same finalisation date.



- 11) The login form was not selecting the correct company when the logged user was logged on to a company using single point login and trying to change to a different user. It was always selecting the last company that was logged on the machine which may not necessarily be the correct company when changing users.

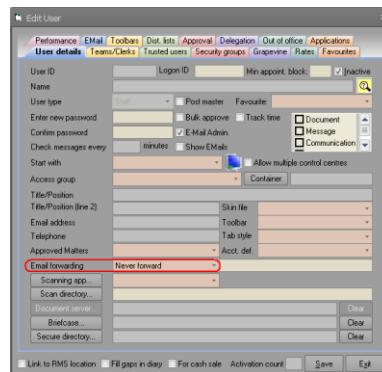


- 12) We added ability to remove stored queries from the client search form. The default for this option was turned off, that is by default all queries were accessible from client search form. However, given that most queries are developed for report writing, we have decided to change the default. From this version onwards, the query will not be visible by default from client search form unless you tick the visible from client search form check box.

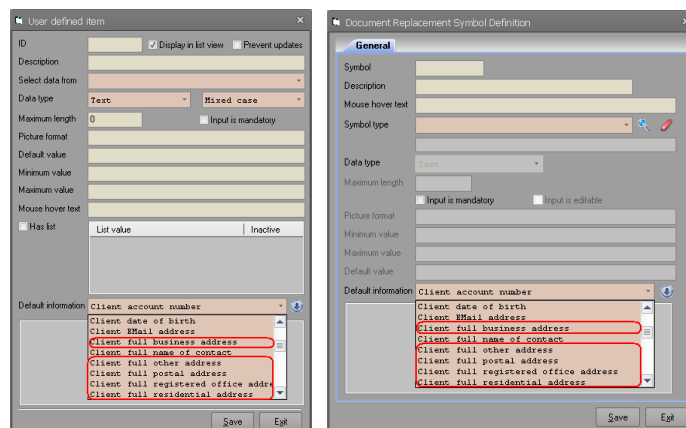


### *Modification as at release 10.00.11*

- 1) Added ability to compact Microsoft Access databases when upgrading them from Synergy. System Administrators will be asked if they want to compact their Access database before upgrading. Please note that Synergy will compact the database before the upgrade starts into a new file with a temporary file name in the same location, and then upon successful compaction, it will delete and rename the file to its original name. It will then upgrade the database and at the end it will repeat the database compact process to get rid of any records that have been deleted as a result of the upgrade process.
- 2) When you notify users from a communication, a message is forwarded to the selected users. Using the user email forwarding option, Synergy can be configured to send these messages externally to the selected user's email address. However, there may be nothing in the body of the message that will highlight what client the communication is made against. In this version we have changed the subject of the message to be "Contact with" followed by the name of the primary client of the communication. This way, any recipient will be able to determine the primary client of the communication.



- 3) When selecting full address information for document replacement symbols or additional data, Synergy was adding a carriage return linefeed between each component of the address. We have changed this so that the suburb, state, country and postcode will appear in a single line in that order.

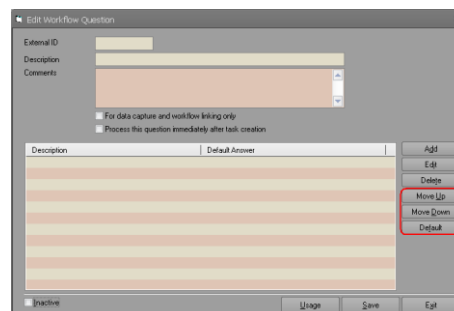


- 4) Synergy was using a single report to display communications from CCC, MCC, WC and the task form. Some customers have tried using customised

reports for each of these but there can ever be one customised report since Synergy has provision for a single report. We have changed this and now allow four entries in report customisation table one for each. Please copy the following reports from the distribution package to your system directory:

ZZCONTAC.RPT,  
ZZCONTAM.RPT,  
ZZCONTAT.RPT,  
ZZCONTAW.RPT

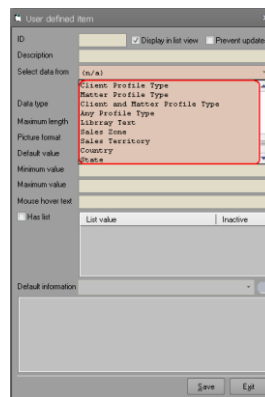
- 5) We have also allowed the Technology one report to be customised on this version.
- 6) We have fixed a bug in follow-up edit form. In cases where auto-association is configured at the matter type level, auto-association and copying of related clients from matter could possibly attempt in adding the same client to the related client list of follow-up. This was causing errors being generated. We have fixed this bug in this version.
- 7) The team query parameters were not filtering out the inactive teams. From this version on, the inactive teams will not be displayed on query parameters.
- 8) Since we have allowed linking additional data to multiple clients and matters, additional data report may not run in cases where linking is done. This is due to the fact that the additional data tables insisted on unique row identifier for every client or matter. If you link an additional data to more than one entity, this violates the additional data table requirements. You may also need to be careful that this could create duplicate records and your report may not display data properly. You will need to ensure that your additional data reports are correct and can handle a single row being linked to multiple entities. In this version, we have removed the requirement for uniqueness of row identifiers for each client or matter. This will allow the additional data tables to be created and populated with data. Please ensure that you review your additional data reports if you are planning to allow linking of additional data to multiple entities.
- 9) Some customers requested to have the ability to order the answers. They have also asked if they can specify a default answer that will be selected when the answers are presented to the users. In this version we have done both of these.



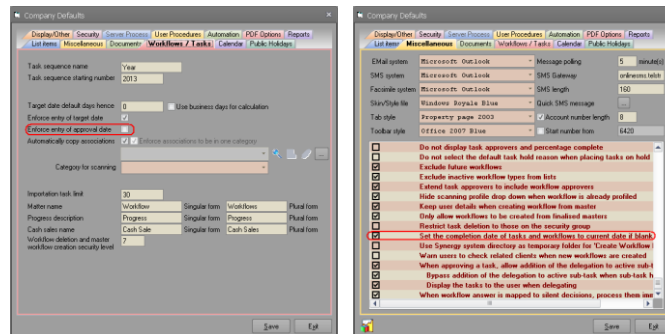
- 10) In this version, we have allowed users to pick profiles, library text, sales one and territories country and state for additional data fields. Administrators can specify what types of profiles are allowed by selecting the correct entry from the drop down. When selecting client profile types, profile categories that are allowed for clients will be displayed for selection. Please note that when selecting these new field types, you will be able to further restrict the data to a specific category. For instance, you can select a specific profile category

when selecting any of the profile type data. This will allow Synergy to only display all profile types for the selected profile category. Unlike other field types, when selecting these new types, you must select the default information to be used. Otherwise, the additional data will be left blank when entities are selected because Synergy will not know what to return as the field value.

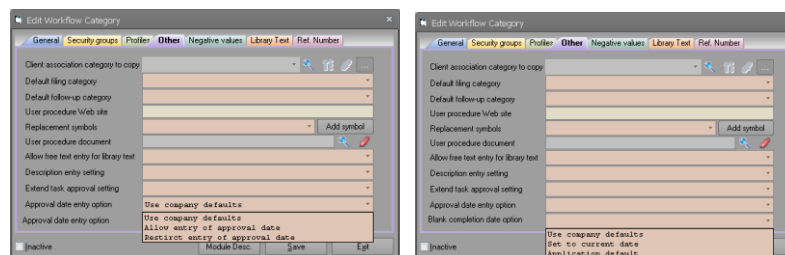
When you have a sales zone as well as territory in your additional data, if the fields are next to each other, that is the sales zone is first and the territory is next, then Synergy will bind these two fields as one field, that is when you select a territory, the sale zone that you have selected in the sale zone field will be used for selection of territory. Similarly for country and state.



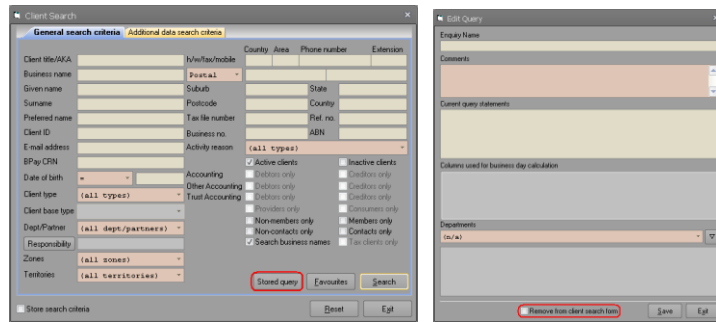
- 11) We have added two new setting to the matter types. These settings are equivalent to the housekeeping setting for matter and task completion date entry. There are two setting that controls whether the completion date should be entered and if is not entered whether the current date should be used.



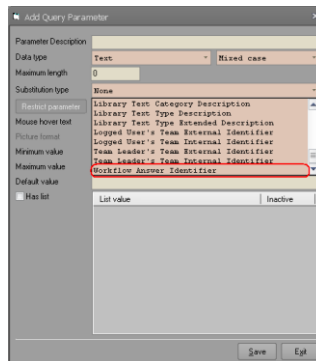
These two setting can now be specified at the matter type level. This will allow greater flexibility. Please note that the matter type setting will have precedence over the housekeeping setting.



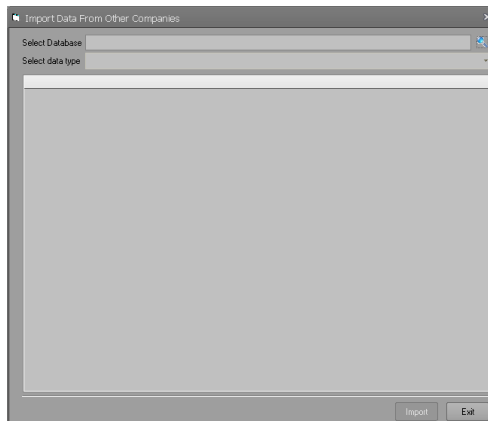
- 12) When clicking the stored query from the client search form, Synergy will display all of the stored queries that exist in the database. However, 90% of these queries may not be developed for the client search form and may not result in anything displayed in the client search result tab. We have added a new setting to queries that will allow administrators to specify whether the query should be removed from the client search form stored query list. This will hopefully reduce the number of queries to those that are truly developed for the client search form.



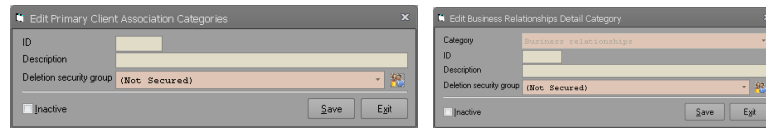
- 13) We have added the ability to use workflow answers as query parameters. Please note that when selecting this option you will be forced to select a question for displaying the answers.



- 14) The importation of entities was not linking security groups, association types properly. We have fixed this bug on this version.



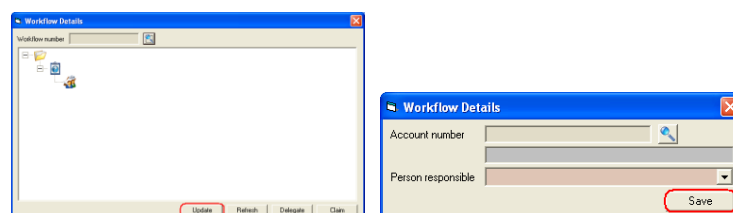
- 15) Added ability to secure the deletion of client association to a security group. This can be done at the association category or association type level. The association will be deleted if the user has security clearance either through the association category security group or association type security group.



- 16) Some clients are using single point login on their environment. These clients have asked if they can start Synergy automatically when a user starts their machines. To assist this process, we have added a new command line switch “/L” (both double quotation marks has to be present on command line) that sites can use for this purpose. Presence of this command line will basically make the login form click the “Ok” button when it starts. If everything is filled in correctly, then this should start Synergy and display the application. If there is something missing, then the user will have to fix it and click the “Ok” button. Please note that the user will not have a chance to turn the exclusive access check box on but that should not be a problem because the exclusive access can be turned on from the “Options” tab of the application ribbon bar if the user is allowed to have exclusive access.



- 17) Software Development Kit library was not applying the default user security groups. This has been fixed. The default user security groups for matter were also not being applied when new matters were created. This also has been fixed.
- 18) Software Development Kit has been amended to include the ability to change the primary client and primary responsibility of the matters through the WorkflowItem class. Please note that for now, these are the only two properties that can change. All rules related to the primary clients and primary responsibility such as matter constraints, housekeeping rules such as keeping the users from master matter etc will be checked. All security settings will also be checked before the update is applied. So only users that can perform this operation through user interface should be able to perform this through Software Development Kit. We have also amended the Software Development Kit test application to include an interface for this.

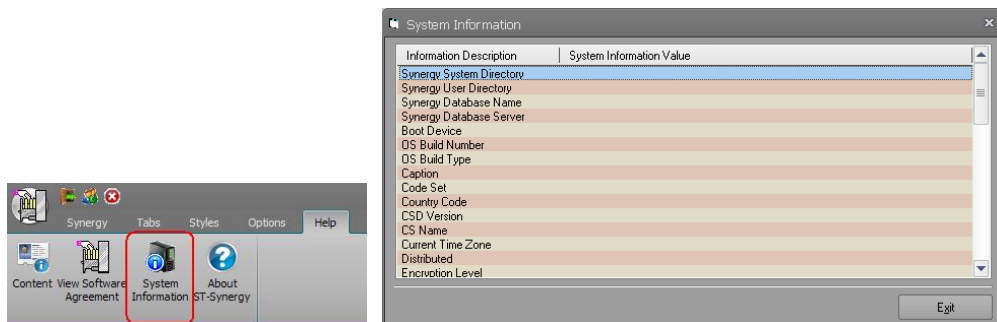


A new method in WorkflowItem class called SetWorkflowItemPrimaryClient will allow you to change the primary client by passing either an internal client identifier or an account number. The internal identifier will take precedence over the account number.

SetWorkflowItemPrimaryResponsibility is the other method in WorkflowItem class that allows programs to change the primary responsibility of the workflow. Programs have to pass either a user internal or external identifier. Precedence is given to user internal identifier.

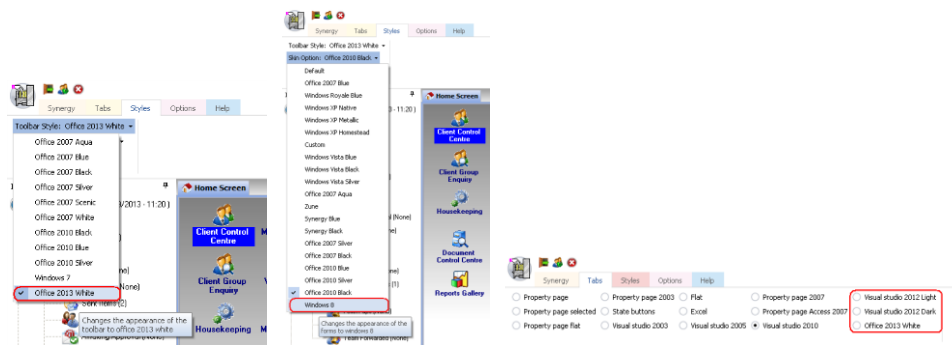
Once these methods are used to change the primary client and/or the primary responsibility, Update method will apply the changes to the matter. Please ensure that you check the error object for any failure when calling these methods.

- 19) Whether a logged user has view access to a client is based on the view security group on client category. Software Development Kit was not determining the view access correctly in the client class. This is fixed.
- 20) Some clients have reported that Synergy application was crashing on Windows 7 32-bit platform when non-office documents were being launched. After a great deal of investigation, the crash was caused because of an access violation within the operating System's Kernel32.dll when ShellExecute API was being called. It seems like ShellExecute windows API was having issues in its memory access module. The only cure that we could find without having to resort to a programming solution was to turn the compatibility mode on for the Synergy shortcut. However, this was not our preferred solution because our clients had to remember to turn on the compatibility mode on after every installation. In this version, Synergy will determine if it is running on a 32-bit version of Windows 7 and if so, it uses a separate Synergy developed executable, STLaunch.exe to launch/print the document. This new executable contains a single call to ShellExecute windows API and nothing more. This change seems to have cured the crashes on this platform. Please note that from this version onward, a new executable will be installed on the application installation directory for Synergy and STServer.
- 21) Added a system information menu option on the ribbon bar. This will display some system information from the machine that Synergy is running on. Please note the OS serial number will be displayed if available only for system administrators. Normal users will not see this info.



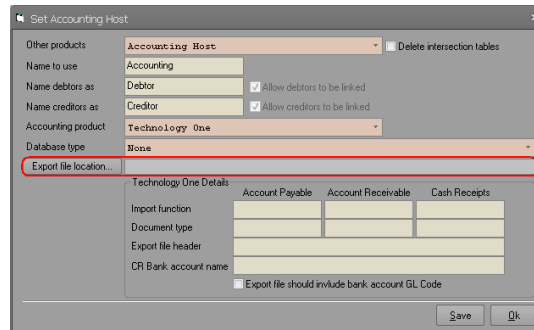


- 22) Added Visual Studio 2012 light, Visual Studio 2012 dark, and Office 2013 white tab styles. Also included Office 2013 ribbon bar styles as well as Windows 8 skin to Synergy application.

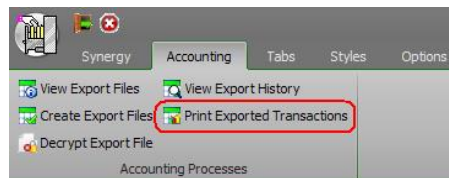


### Modification as at release 10.00.10


- Added ability to specify a directory for the Technology One accounting system export files.



- In the previous versions, when there were no transactions for a transaction type, Synergy was not creating the export file for it. In this version, we have changed it so that a blank file with only column headers is created even if there were no transactions.
- In this version, we have added a report that will run at the end of the Technology One export file creation process, to list the transactions that have been exported. We have also added a new menu item in the accounting tab of the ribbon bar that allows this report to be run for any previously exported files. With the addition of this feature, there are 3 ways to see what exactly were exported to the export file, “View Export History”, “Decrypt Export File”, and the new “Print Exported Transactions” ribbon bar menu options. Please copy ZZTCHONE.RPT to Synergy’s system directory.



The report will list only the debtor and creditors entries. GL lines will not be in the report. When running the transaction report, if there is more than one export, the user will be given the opportunity to select an export from the list. All accounts payable, accounts receivable and cash receipts will be in the report even if there were no transactions.



ST Synergy

enterprise knowledge management

Technology One Export File Control Report

Report Date/Time: 05/07/2013 10:35:50

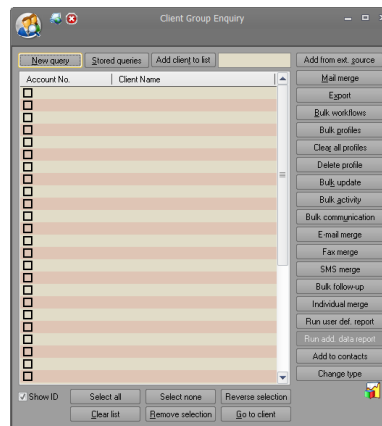
Export Date/Time/User: 04/07/2013 20:02:08 System Administrator

Accounts Payable										
Invoiced Date	Narrative Lines	Reference Number	Matter Number	Net Amount	GST Amount	Total Amount	Entered By	Approved By	Transaction Created By	Creditor Name

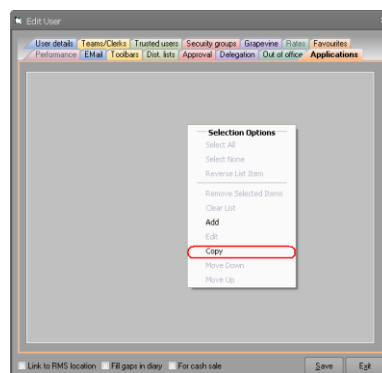
Accounts Receivable										
Invoiced Date	Narrative Lines	Reference Number	Matter Number	Net Amount	GST Amount	Total Amount	Entered By	Approved By	Transaction Created By	Debtor Name

Cash Receipts										
Invoiced Date	Narrative Lines	Reference Number	Matter Number	Net Amount	GST Amount	Total Amount	Entered By	Approved By	Transaction Created By	Debtor Name

- ✚ We have change the list box in the Client Group Enquiry form to a sortable list view. The functionality of the buttons remains identical to its predecessor.

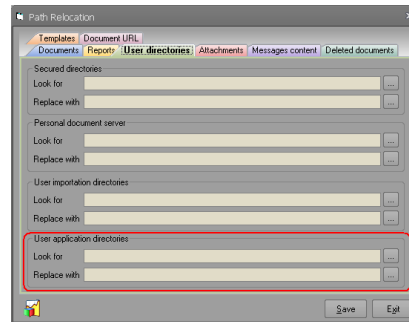


- ✚ We have added ability to copy user application settings from the user edit form. This will allow user applications to be easily copied from one user to another user.



- ✚ Synergy can be configured to create an exclusion list when clients are deleted. This exclusion list can then be used to exclude clients from synchronisation with Synergy database using the client synchronisation process. Software Development Kit was not considering this exclusion list. So if you passed an account number that was in the exclusion list, it was happily creating the client. We have changed the library to validate the account numbers against the exclusion list.
- ✚ When passing an account number to Software Development Kit for creation of a client object, Software Development Kit was only considering the current account number for clients. Consequently, if you ever passed a historical account number, the library would have considered this as a new client and the attempt at adding the client would have failed because it could not have created the historical account number record. We have amended the library code to properly look at both, the current and history table when account numbers are passed in determining whether an account number exists or not.
- ✚ When setting client account numbers manually through Synergy user interface, it was enforcing the account number length set at the Housekeeping even if the client type had its own account number generation setting. This bug is fixed on this version.

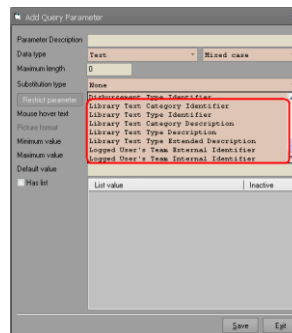
- ✚ Software Development Kit was allowing referral source and client rating to be set for project and project with address type clients while the same functionality was not available from the user interface. We have changed the Software Development Kit to generate an error should users use referral source and client rating other than the defaults for these types of clients.
- ✚ We have changed the Software Development Kit test application to select the default values and disable the drop downs for the referral source and client ratings.
- ✚ We have added ability to replace user application directories.



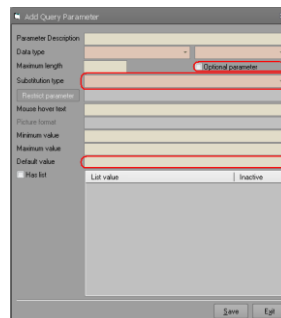
- ✚ When enforcing the client account number formats, the Software Development Kit was not checking this. Hence, one could add clients with inconsistent account number format to that defined in the client type setting. This is fixed in this version.

### *Modification as at release 10.00.09*

- Added an export date, export time and the person that has exported the Tech One transaction to the database.
- Added new query parameters for use with library text and logged user's teams. There are options for library text category and type identifiers as well as description. It is also possible to filter queries by extended description of the library text type. Given that the extended description for library text type is a memo field, it can accept all types of characters. Consequently, you should be extremely careful as to when you can use the extended description. Having non-alphanumeric characters may create run-time errors when SQL statements are executed.



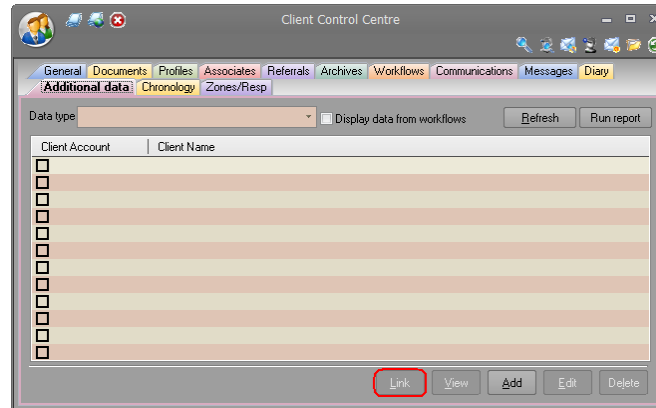
- We have allowed query parameters with specific substitution types to be defined as optional. When a query parameter is defined as optional, the first item in the list will be "All". When users select the "All" entry, default value defined for the query parameter will be returned as the selected value. You must enter a default value for all optional parameters.



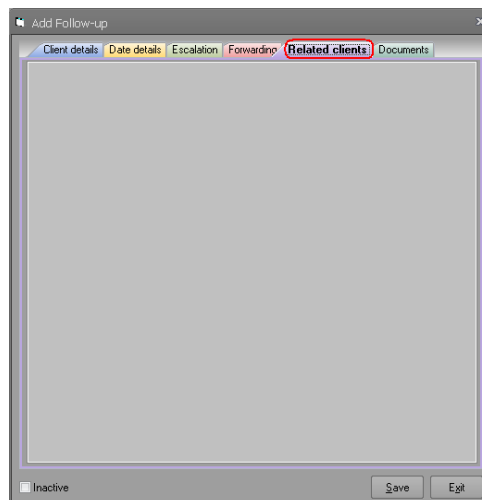
- We have added a query parameter edit button to the query builder form. Double clicking the parameter from the list will also edit that query parameter.



- ✚ Linking additional data from the Client Control Centre was linking all entries from the additional data list view rather than the highlighted entry. This was due to the list not having the check boxes for multi-selection. We have added multi-select check boxes to this list to allow multiple selections. We have also added a pop-up menu to allow normal list selection options.

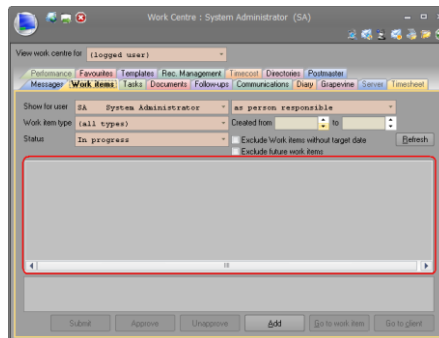


- ✚ When making decisions from a workflow, it is possible to configure and create a follow-up. Given that follow-ups can have related clients, from this version on, we copy the related clients of the matter as related clients of the follow-up when follow-ups are created from within the workflow decisions. This is the only scenario where the related clients are copied for follow-ups.



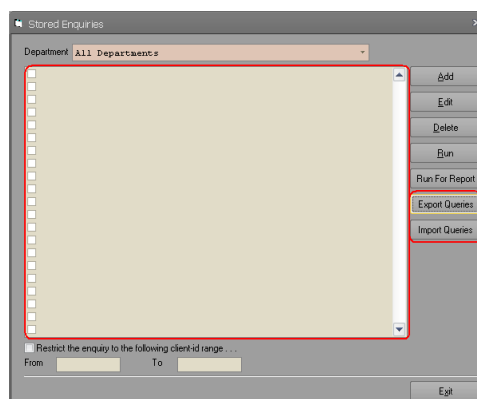
- ✚ Software Development Kit was not auto-finalising the imported documents. This is fixed.
- ✚ Software Development Kit was not auto-associating imported documents. This is fixed.
- ✚ In the Software Development Kit test application we have made the document name optional.
- ✚ The attention field was not being displayed in one of the client edit forms. This is fixed.
- ✚ When cloning a user, the trusted users (both ways) are now being copied. In previous versions only users that cloned user was trusting were being copied. We are also cloning the user applications when users are cloned.

- ✚ The matters list at the Work Centre now remembers the sort order and selected list item. Refreshing the list will attempt to sort the list in the same order and select the same item if possible.



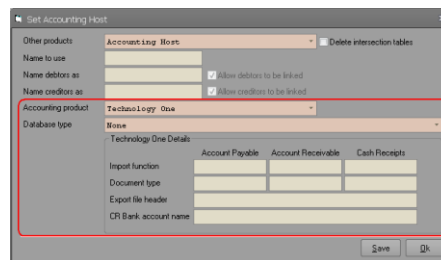
- ✚ The RMS tab in the Work Centre was being displayed regardless of the Extended Model setting in the housekeeper. This tab is now only made visible if the Extended Model setting is turned off.
- ✚ Added an import and export button to the stored query form. This will allow selected queries (using checkboxes) exported to an access database. This database can then be used to import the queries into another database. In most cases, this could be achieved using the popup menu from the enquiry maintenance form. However, in some cases, there may not be a direct access to a source company database for copying of queries. These buttons will be useful in those cases. Please note that parameters are matched based on the name rather than type or anything else. If a parameter name already exists in the database, the import function will link the existing parameter to the query. We have also added a check box with a popup menu (using right mouse button) to assist in selecting multiple entries.

Please note that the delete button is now changed to delete all selected entries not just the highlighted one. If there are no checked entries, then the highlighted entry will be deleted.

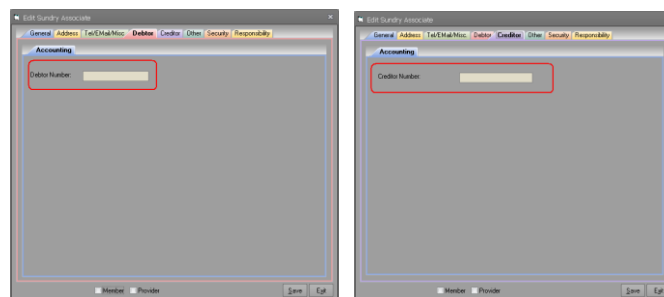


### *Modification as at release 10.00.08*

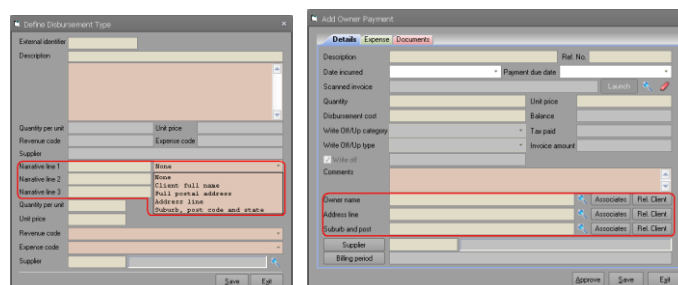
- Allowed document type, import function name and file specification to be entered for Technology One accounting system.



- Allowed debtor and creditor identifiers to be specified for Technology One accounting system.

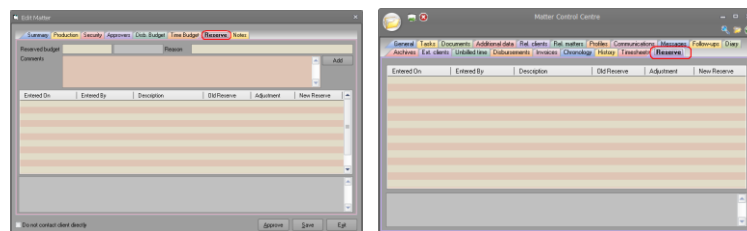


- When using Technology One accounting system, some sites may decide to have a single supplier in their accounting system and create disbursements against that sundry supplier. However, the finance department may still want to know where the cheques have to be sent and who they should be addressed to. There are three narrative lines in Technology One accounting system. These narrative lines can be used to pass this information from Synergy to Technology one. To make it easier for the users to know what piece of information should be entered on each, we have amended the disbursement types to allow sites to specify a description for each Technology One narrative line and specify whether the information is mandatory or not. For now, we have allowed client name, full address to be entered. We have also allowed the full address to be split into two fields and this can be done using the "Address line" and "Suburb, post code and state" entry from the drop downs. Using "None" will make that particular narrative line invisible in the disbursement entry form. We have also allowed these fields to be populated from the related clients of the matter as well as associates of the primary client of the matter. If client is not attached the matter as related client or as associate to the primary client, then users can use the locate button to locate any client in the system.

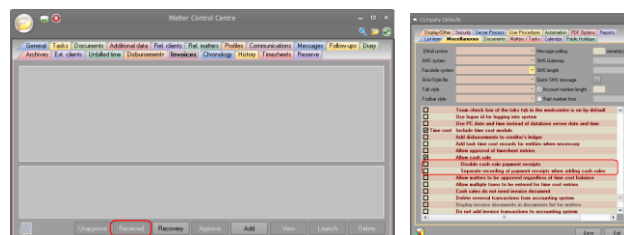




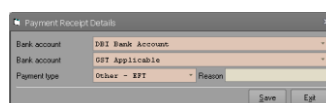
- Some organisations may not want to use complete budgeting for matters and may be happy with just recording a reserve budget for their matters. Some others may decide to use reserve budgeting until such time that firm budgeting is known or a combination of the two. To cater for both needs, we have created a new tab in the matter form to allow for reserve budgeting. This tab will keep the history of the reserve budget amount. We have also added a new “Reserve” tab to Matter Control Centre to display the data. When new matters are created, the current reserve will be copied to the newly created matter. The reserve budget history can be removed from master matters using the clear button. The Software Development Kit is also changed to cater for reserve amounts.



- In previous version, we allowed cash sales to be created in Synergy. The cash sales button was creating both the invoice as well as the cash receipt transactions. In many cases, the organisation may not have received the payment yet. To cater for these cases, we decided to separate the creation of recovery invoice from the creation of cash receipt transactions. To separate these two functions, we have added a new setting in the company defaults. When these functions are separated, the recovery button will only create the invoice part. When the actual payment is received, the user can click the “Receipt” button in the invoices tab of the Matter Control Centre to indicate that the payment has been received. This will create the cash receipt transaction and push that to the bank account GL in the Technology One accounting system. We have also allowed the payment receipting to be completely disabled so that cash receipts will never be generated. This can be set from the company defaults form.



- When separating the payment receipt from the invoicing, Synergy will allow the user to specify the relevant GL and tax code when payments are recorded.

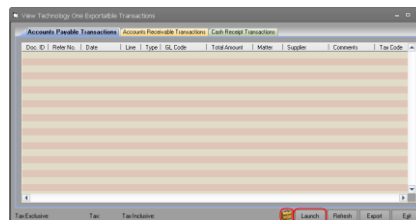


- For Technology One accounting system, Synergy is capable of recording all transactions and their reversals. However, given that the integration to

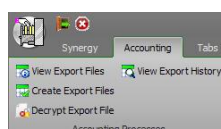
Technology one is via flat csv files, it is possible that the transactions that approved transactions for a reversal may not have been pushed to the Technology One accounting system yet. In these cases, an organisation may want to delete the approved transactions rather than leaving them there and adding the required reversals. We recommend organisations to turn this setting off because firstly, it will allow a full history of the transactions to be kept in the system and secondly, when web services integration is implemented, these transactions will be added to Technology One the second the approval is done. So for consistency reason, we strongly suggest to leave this setting turned off. However, you can turn this setting on and avoid having possibly redundant transactions from appearing in Technology One.



- When viewing Technology On accounts payable transactions, users can now launch disbursement documents if they need to check something. There is also a briefcase button that allows users to briefcase all of the documents for the displayed transactions.



- We have amended Synergy to combine, encrypt and import the Technology One csv export files as text document. Given that these documents are encrypted for security reasons, we have added a new menu item to allow users to decrypt and view the content of these encrypted files. The transactions will be displayed in the view export file form. When selecting to view the encrypted file, the user will be asked to select an export from the history and then load the encrypted document for that export. All security setting for the document will be checked before it is decrypted. The user must have security clearance to launch the encrypted document for this function to work.



- We have changed the logging in the Synchronisation process. In previous versions, the log file was getting opened at the start and then closed at the end.

All writes to the log files were being cached and flushed at the time of closure. Consequently, only 64KB of data was ever written to the log file. In cases where there could be errors, this size may not be appropriate. From this version onwards, the log file will be flushed to the disk every time a message is written. This will ensure that all log messages will be on the log file. This should not have a great performance impact as in normal operation only a few log messages are written to the file.

- In previous versions, we allowed splitting of disbursement invoices among multiple matters. In some cases, organisations may want to disable this for certain disbursement types. We have added a setting to the disbursement types that allows administrators to specify whether disbursement invoice splitting is allowed. We have also added more options for defining how disbursement reference number should be validated. There was also a bug that did not allow administrators to inactivate disbursements. This is fixed as well.

- The list items of the company defaults form now has a default document template identifier. For now, this template identifier is only used for importation of Technology One csv files. However, the use of this option could be extended in the future to other areas of the system. Although defined as an optional list item, this is a mandatory requirement for the sites integrated to Technology One accounting system.

- A few public release back, we introduced concept of forwarding follow-ups in order to reduce the number of messages that may need to be sent back and forth for completing the follow-up. There was a bug in Software Development Kit related to the forwarded follow-ups. This has been fixed.

- ✚ In V10.00.04, we changed Synergy to keep track of matters and masters they were created from. There was a bug in Software Development Kit related to this. This bug is fixed on this version.
- ✚ We have added the total time, disbursement and reserve budgets to the summary tab of the matter edit form.

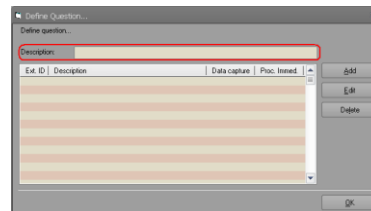
The screenshot shows the 'Edit Matter' form with the 'Summary' tab selected. The form contains various input fields for client and matter information. A red box highlights the 'Time Budget', 'Disbursement budget', and 'Current reserve amount' fields, which were added in version V10.00.04. The 'Time Budget' field is currently empty, while the other two have some text.

Field	Value
Client ID	
Client name	
Year	
Matter type	
Description list	
Description	
Date received	
Target date	
Importance	
Responsibility	
Secondary Resp	
Approval by	
Assigned by	
Estimated fee	
Actual fee	
Notes	
Time Budget	
Disbursement budget	
Current reserve amount	

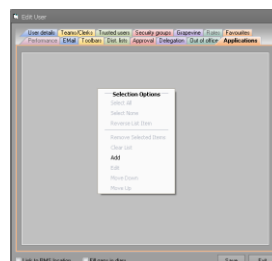
- ✚ Delete button from the matters tab of the Client Control Centre and the delete button on the general tab of the Matter Control Centre was using different deletion context. Consequently, a matter that could be deleted by a user from the general tab of the Matter Control Centre could not be deleted from the matters tab of the Client Control Centre. These buttons are now using the same deletion context.

### *Modification as at release 10.00.07*

- ✚ In multi-monitor systems, Synergy was determining the monitor by the location of the MDI form when it was last closed. When starting the application, the relevant monitor was used to display the logon form. During the logging process, when a user moves the logon form from one monitor to another, Synergy was completely ignoring this movement and loading the application on the monitor that was last saved. In this version, we have allowed Synergy to keep track of the monitor where the logon form is and load the application in the same monitor that logon form is.
- ✚ When maintaining workflow questions, users can now filter the list by the question description. Please note that you will have to type in the description box and press the enter key for filtering to occur. Also, once the list is filtered, the description box will be blanked out. If you press enter key again, all questions will be displayed.

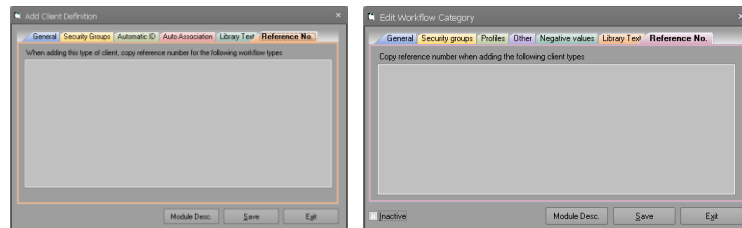


- ✚ We have allowed administrators to add user applications from the user maintenance form.



- ✚ In some organisations, the reference number of a related client to a workflow may convey an important piece of information. For example, consider sales oriented organisation which have a workflow for sales and delivery of their machinery. Each machine is defined as a client within Synergy and contains a serial number. Sales and delivery workflows are created against customers because they are the ones purchasing the machines. At the sales or delivery workflows, the machines are allocated to the customer by linking them to the proper workflow as related client. In Synergy (Work Centre matter and task tabs and Client Control Centre), users would generally like to see what machine has been allocated to a sales process or being delivered as part of the delivery process in various lists. Given that the machine is linked to the workflow as related client this is impossible to achieve. We have added a new setting that allows Synergy to copy a reference from client to matter when they are added as related client. In this example, this organisation can configure Synergy to copy the reference number of machine type clients to the sales and delivery type matters. This way, whenever a machine is allocated to an in progress sales or delivery matter (linked as related client), Synergy will

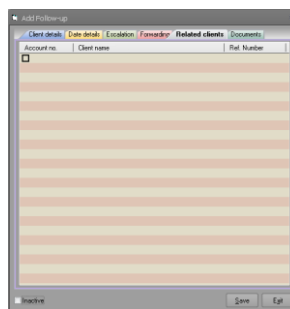
automatically copy the reference number of the client to the reference number of the matter. Although in this example, the reference numbers may be unique but in general, Synergy does not impose uniqueness on client reference number. Consequently, when unlinking the related clients, the matter reference number will not be touched. It is assumed that the purpose of unlinking the related client is to link the proper client back in. Hence the reference number should be set when the new client is linked to the workflow. Please note that when linking multiple related clients, the reference number of last allowable client in the list will be used even if it is blank.



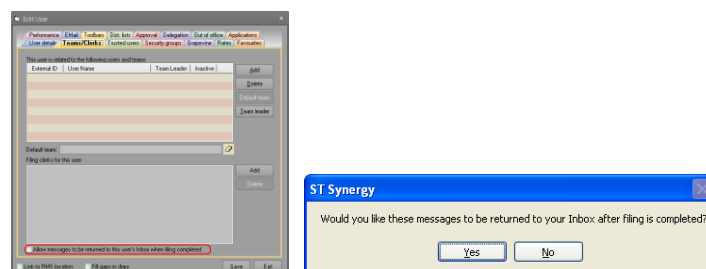
The Software Development Kit has been changed to cater for this new configuration. Please note that this configuration will take effect if a reference number is not being passed to the Software Development Kit.



We are now displaying the client reference number in the related client list of the follow-up maintenance form.

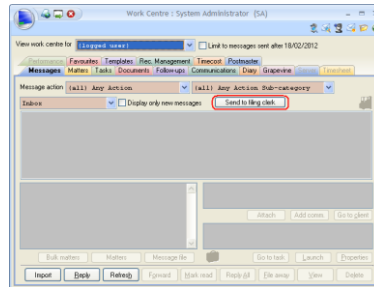


Some customers have requested to have the ability for a user to send externally imported outlook messages to his/her filing clerk and have the system return these messages to his/her Work Centre Inbox when their filing clerk has completed filing (files the message away). We have added a check box to user profile that allows Administrators to specify if the user can perform this operation. With this setting on, at the time of importation, Synergy will ask the user whether s/he would like imported messages to be returned to the user's Inbox.

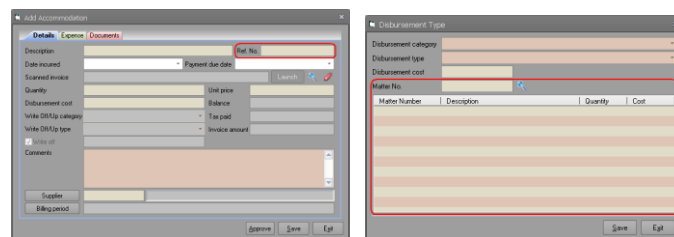


When user requests a message to be returned to his/her Work Centre Inbox, it is the user's responsibility to file the message away.

- When users dropping external outlook emails to the "Send to filing" button, Synergy was asking if they would like to edit messages. Since these messages were meant to be handled by the filing clerk and not the user that is importing them, we have removed this question during this importation. Synergy will no longer allow editing of messages when they are sent to filing clerk.



- Added a reference number to disbursements and allowed creating multiple disbursements by splitting the cost among multiple matters. This can be done during the disbursement type selection. The matter that disbursement is created from cannot be deleted from the matter list view. However, other matters can be added to the list. As matters are added, the total disbursement cost will be divided equally among those matters. The cost is rounded to the nearest dollar in order to avoid rounding error in tax calculations. Users can alter the disbursement amount if they wish to by clicking on the entry and changing the amount and then clicking the add button.



- In previous version, we introduced a setting that directed Synergy to search for client names when users enter data in an account number field. This setting was only used in Client Control Centre. We have now changed the description of this setting and intend to extend the same functionality to forms that allow entry of client account number. This will be done in stages as there are so many forms with this capability.



In this version, the users can enter partial client names in account number fields in the following forms:

Follow-up creation form and Client Group Enquiry:

The image shows two software windows. The 'Add Follow-up' window on the left has tabs for 'Client details', 'Data details', 'Escalation', 'Related clients', and 'Documents'. The 'Client details' tab is active, showing fields for Client ID, Client name, Type, Comments, Importance, Contact name, Telephone number, Alternate number, Fax number, Mobile number, VVIP details, and Email address. The 'Client Group Enquiry' window on the right has tabs for 'Client enquiry', 'Grouped queries', 'Add client to list', and 'Add from ext. source'. The 'Add client to list' tab is active, showing a list of clients and buttons for 'Show ID', 'Select all', 'Select none', 'Reverse selection', 'Clear list', 'Remove selection', and 'Go to client'.

Appointment and disbursement creation forms:

The image shows two software windows. The 'Add Appointment' window on the left has tabs for 'General', 'Appointment', 'Clients', 'Documents', 'Tasks', and 'Security'. The 'Appointment' tab is active, showing fields for 'Please activated client attending the appointment', 'Please select client', 'Please select date', and 'Please select time'. The 'Add Accommodation' window on the right has tabs for 'Details', 'Expense', and 'Documents'. The 'Details' tab is active, showing fields for Description, Date incurred, Scanned invoice, Quantity, Disbursement cost, Write Off/Up category, Write Off/Up type, Comments, Supplier, and Billing period.

Task creation form and Work Centre:

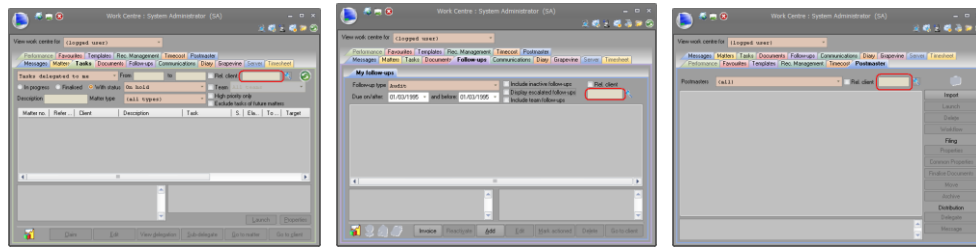
The image shows two software windows. The 'Add Task' window on the left has tabs for 'Chronology', 'Timesheets', 'Notes', 'Mail items', 'Summary', 'Production', 'Documents', 'Proforma', 'Communications', 'Messages', 'Followups', 'Days', 'Clients', and 'Guidelines'. The 'Clients' tab is active, showing a list of clients and a 'Client ID' field. The 'Calendar Control Centre' window on the right has tabs for 'General', 'Staff schedule', 'Client schedule', and 'Matrix schedule'. The 'Client schedule' tab is active, showing a calendar view for March 2013 with a 'Client' dropdown and a 'Time' dropdown.

Document properties and communication maintenance forms:

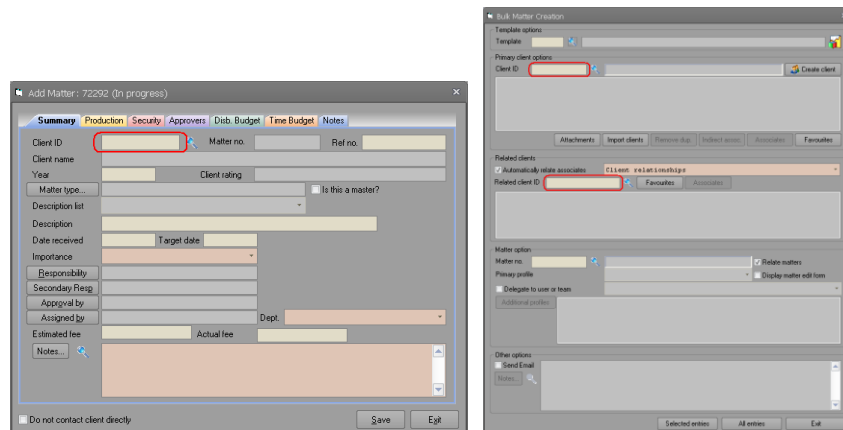
The image shows two software windows. The 'Document Properties' window on the left has tabs for 'Proforma', 'Guidelines', 'Web', 'Identification', 'Classification', 'Clients', 'Key words', 'Misc', 'Preview', 'Tasks', 'Security', and 'Addressed'. The 'Clients' tab is active, showing a list of clients and a 'Client ID' field. The 'Add Communication Details' window on the right has tabs for 'General', 'Classification', 'Clients', 'Security', 'Tasks', and 'Days'. The 'General' tab is active, showing fields for 'Please select client', 'Phone number', 'Reference no.', 'Rating', 'Direction', 'Out contact', 'Text contact', 'Contact method', 'Phone number', 'Contact date', 'Start time', 'End time', 'Notes', and 'Template'.



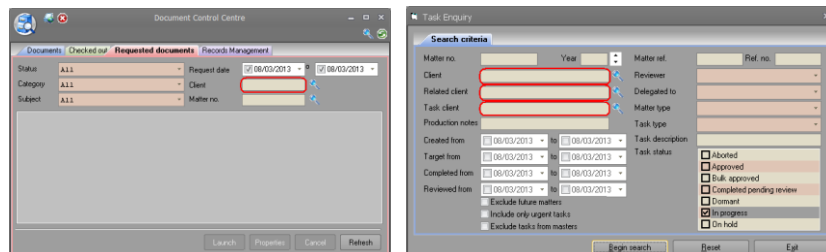
Work Centre task, follow-up and postmaster tabs:



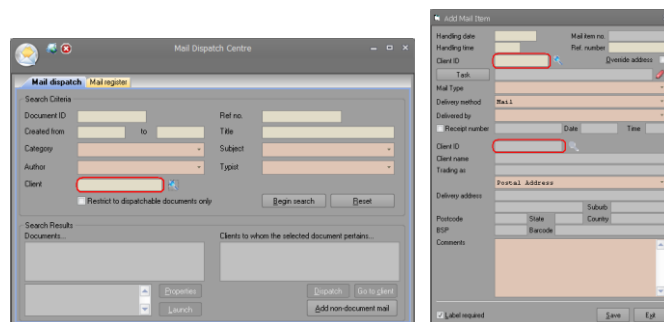
Matter form and bulk matter creation from message tab of Work Centre:



Document Control Centre and task enquiry form:

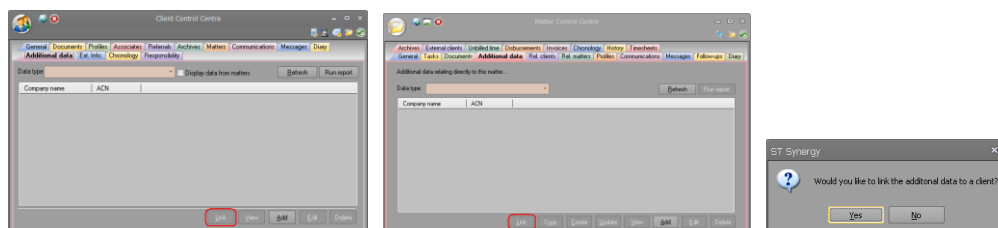


And Mail Dispatch Centre and non-document mail item form:

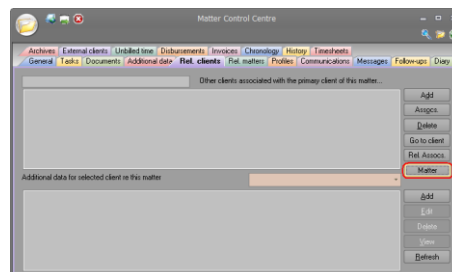


✚ In many cases, it may be desirable to have the same additional data to be linked to multiple matters and clients. Although this can be done by copying the additional data rows, any updates to additional data rows will not be reflected in other rows copied from the same row. Linking however, has the added benefit of reducing the amount of data stored in the database as well as

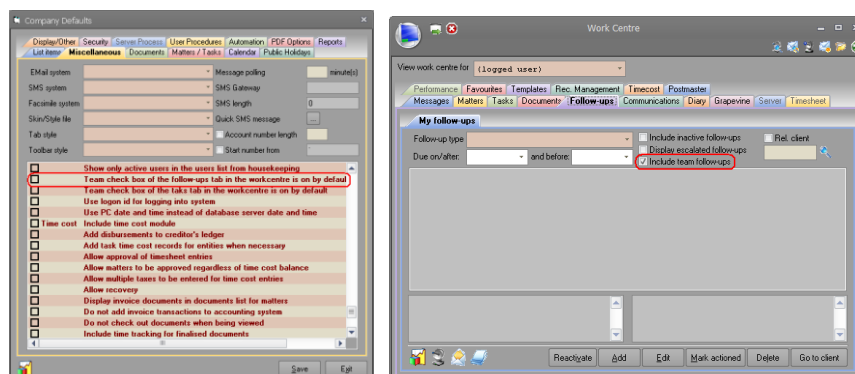
allowing updates to be done once. We have added the ability to link additional data rows to multiple clients and matters. All additional data rules will be checked before the link is established, that is, the user must have security clearance to add the additional data, and the additional data must be allowed for the client or matter type. Please note that when you delete the additional data rows (from client or matter) Synergy will only remove the link to the client or matter if there are multiple entities linked to the additional data row. The additional data row will completely delete when the last entity link is removed from the database. When linking, the user will be asked whether s/he wants to link the row to a client or matter. This change has been incorporated into Software Development Kit library. The deletion of the additional data row in the Software Development Kit has also been amended to look after additional data rows being linked to more than one entity.



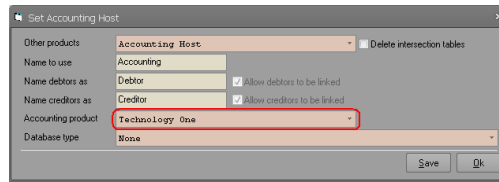
- Added a button to the related client tab of the Matter Control Centre that allows users to create a matter for the select related client. Once the matter is created, the new matter will be linked to the matter. The primary client and all related clients in the list will also be linked to the new matter as related clients. This will make it a lot easier when matters have to be created for related clients.



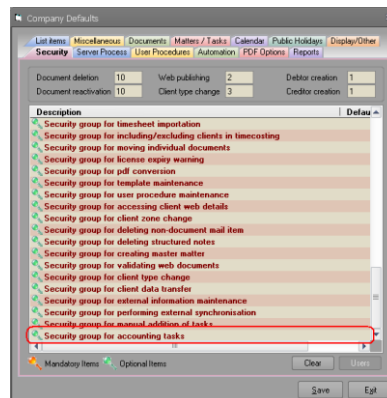
- Added an option to company default to allow the team check box of the follow-up tab to be on by default.



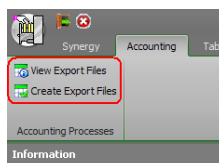
- Integrated Synergy with a new accounting system called Technology One. The current method of integration is via flat csv files.



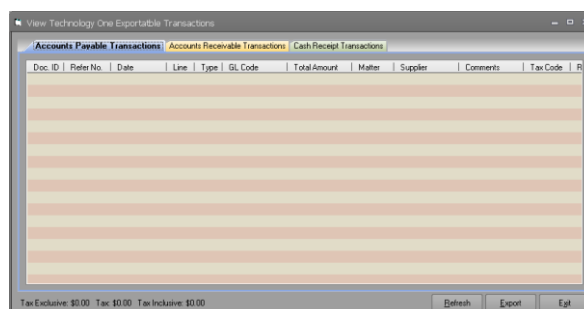
A new security group allows sites to specify the group of users that can export the accounting transactions into the flat file. This can be set up from the company defaults.



A new accounting tab from the ribbon bar will allow those users that can create flat file to view and create the required csv files.



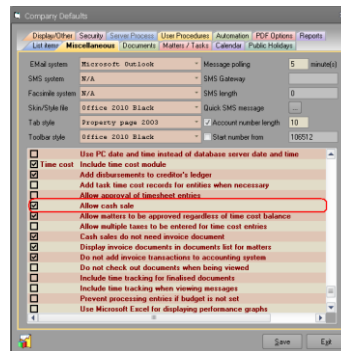
View option will display the exportable transactions in the following form. All exportable accounts payable, receivable and cash receipt transactions will be displayed in their own list. The control totals will be displayed for each tab at the bottom left side of the form.



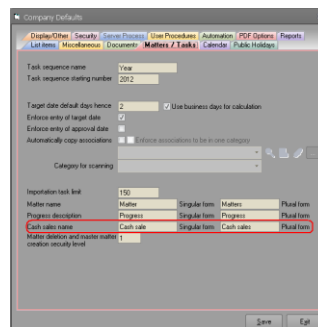
- Introduced the concept of cash sales to our time costing system. A cash sale is pretty much identical to an invoice. The only difference is that a cash sale is actually is an invoice for an amount that you have actually received. Imagine

cases where you have an invoice for \$10,000 but you may know that you are not going to recover the entire amount of invoice from the customer for various reason (customer has been liquidated etc). Creating the invoice and pushing the transactions into your accounting system may create more work because once you receive the actual money, you will have to reverse this invoice and enter the correct amount that you have received. A cash sale allows you to create an invoice for the exact amount that you have received, therefore reducing the amount of work that you have to do in your accounting system. We have added the following configurations for organisations that would like to use the cash sales set up.

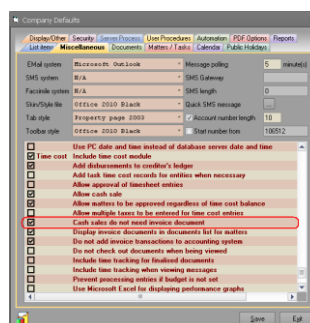
We have added the ability to turn on the cash sale setup.



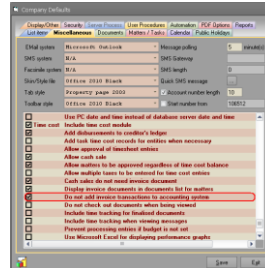
We have added the ability to rename cash sale similar to matter name. Some organisations may decide to call these recoveries and this will allow those sites to rename this as they like.



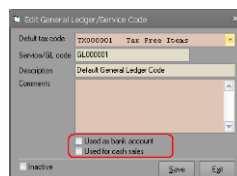
You may not want to create invoice documents for cash sales because you have already received the money. We have defined a new setting to cater for this.



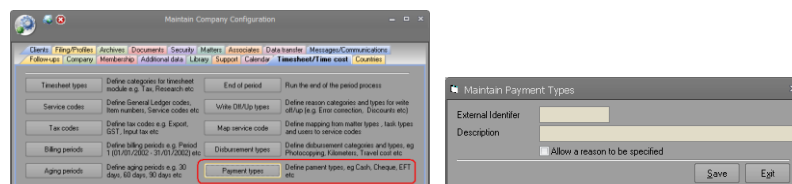
Even in a cash sale environment, you may still want to create the original invoice (for full \$10,000.00 in our above example) in Synergy. However, you may not want to push that invoice to your accounting system. We have added a new setting to cater for this requirement.



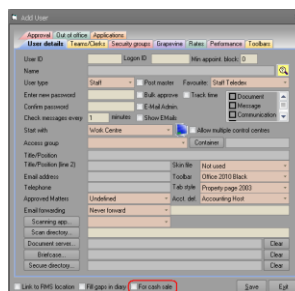
We have added new settings for GL codes to allow specific GL codes to be nominated for cash sales transactions. Also, when performing cash sales, the bank account in your accounting system needs to be credited. We have added a new setting to GL codes that helps users to nominate specific GL codes as bank account.



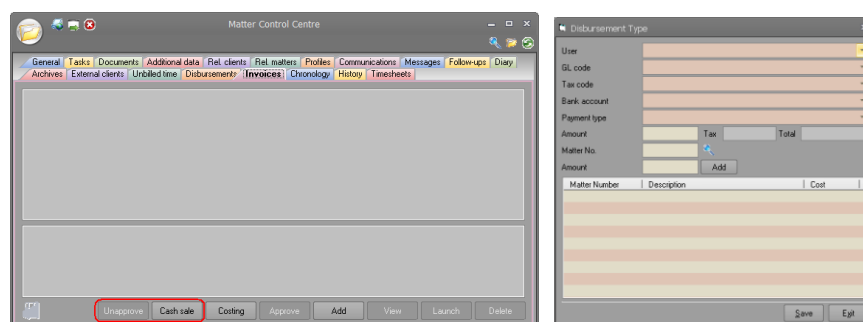
We have added a payment method to allow sites to specify the method they have received the money (e.g. Cash, Cheque, EFT etc.). You can also allow users to specify a reason for the payment method.



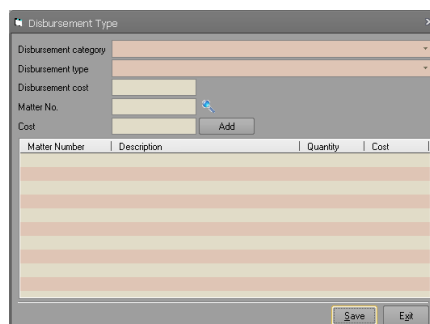
Cash sales invoice will add time entry for users in the time cost system. Sites may not want these time entries to interfere with normal users time entries. We have allowed administrators to nominate users that can receive cash sales time entries; we have amended the user profile to cater for this.



Cash sales can be entered from the invoice tab of the Matter Control Centre. When linked to Technology One accounting system, cash sales and invoices can be unapproved. When these items are unapproved, the original transactions will be reversed in the Technology One accounting system. Similar to an invoice, a cash sale can be split into multiple matters. The cash sale form allows users to nominate the matters that form part of the cash sale. The total amount entered will be split roughly equally among the selected matters. To avoid rounding issues, the amounts are truncated to nearest dollar. The last matter may be allocated more because of this. The user can change the allocated amounts by clicking on the matter in the list and amending the amount. Please ensure that all cents are allocated to a single matter when you have multiple matters. Failing to do this, may create rounding issues specially when applying GST to these entries.

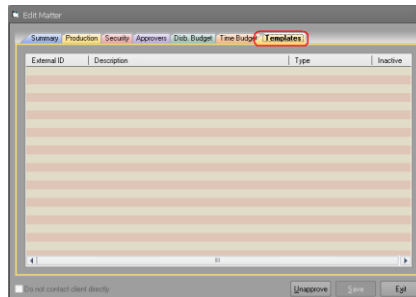


Imagine that you nominate a legal firm to do some legal work for a few matters that you have in the system. The legal firm decides to send you one invoice for all the work that they have done for all of the matters. To create these disbursements in Synergy, users have to load each matter separately, calculate the amount that needs to be allocated to that matter and create the disbursement. To streamline this process, we have changed the disbursement type selection form to allow users to specify multiple matters. When multiple matters are selected, Synergy will divide the total cost roughly equally among the selected matters. To avoid rounding issues, the amounts are truncated to the nearest dollar. If users would like to change the amounts, they can select the matter from the list, change the amount and press the add button. Please ensure that all cents are allocated to a single matter when you have multiple matters. Failing to do this, may create rounding issues specially when applying GST to these entries.



In many instances, when administrators need to change master matter configuration, they may decide to create a completely new master matter

based on the old one and then amend the newly created master matter. This allows the live matters created from the old master to complete their life span with the configuration of the old master matter and any new matters to follow the configuration of the newly created master. In these cases, it may be required to swap the matter number in the templates that was using the old master matter. This was very cumbersome because there was no easy way to know which templates were referencing the master matter. In this version, we have added a template tab to the matter edit form. This tab is only displayed if the matter is master. Housekeepers can edit the template and remove the matter from the template from this form. Please note that the tab will be made invisible when there are no templates linked to the master matter.



- ✚ Using the copy and paste option in the staff schedule tab of the Calendar Control Centre was not setting the subject and comments of timesheet entry correctly. This bug is fixed on this version.
- ✚ Renamed the following objects and types in the Software Development Kit library. Please rename these objects in your applications first before using this version:

#### Objects:

clsSTSDKWorkflowItem

clsSTSDKMasterWorkflowItem

#### Properties:

WorkflowItem

MasterWorkflowItem (Library object)

#### Types:

SDKWorkflowStatusTypeUndefined

stSDKWorkflowStatusTypeUndefined

SDKWorkflowStatusTypeActive

stSDKWorkflowStatusTypeActive

SDKWorkflowStatusTypeUnderReview

stSDKWorkflowStatusTypeUnderReview

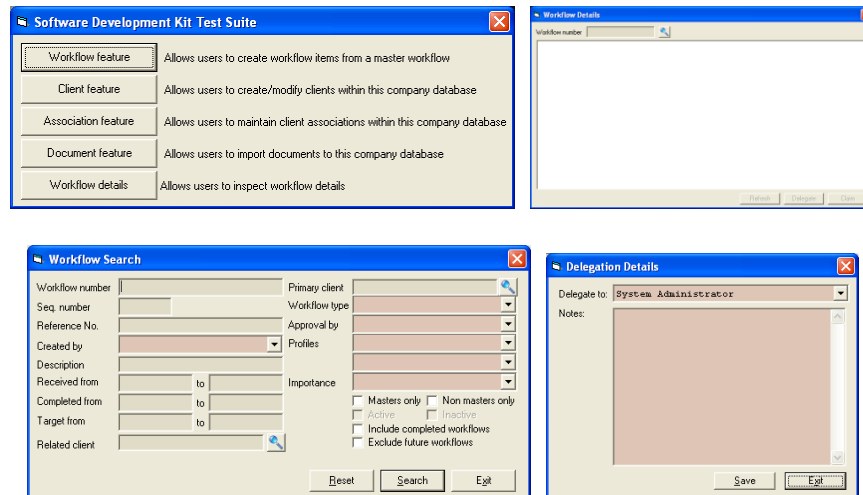
SDKWorkflowStatusTypeApproved

stSDKWorkflowStatusTypeApproved

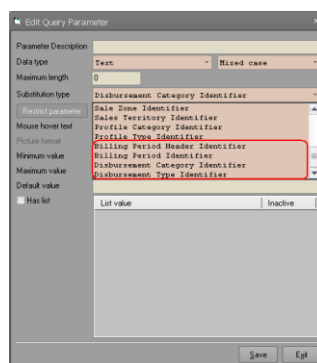
- ✚ Created new classes in Software Development Kit. clsSTSDKWorkflowItem class represents a workflow item. The properties of this object allows applications to display a tree view representation of the workflow. The tasks collection of this object will provide you all of the tasks within the workflow. Each task is represented as a clsSTSDKWorkflowTask object. Each task provides the parent task as well as the collection of children. Tasks also have a delegation collection of class clsSTSDKWorkflowTaskDelegation. Delegation objects have a similar hierarchical structure as tasks. Each delegation will provide access to its parent and all its children. Currently, apart from refreshing the objects, capabilities of these objects are very limited. Please note that these objects will be subject of vast changes in future version.

The intention is, if possible, to make these objects pretty much equivalent to their counter part from the user interface.

- Added new forms to the Software Development Kit test application to demonstrate the newly added workflow item features. This application now includes the ability to search for a workflow and display the tree view representation of the workflow. Also two buttons allow tasks to be delegated as well as delegations to be claimed.



- Added three new query parameters.

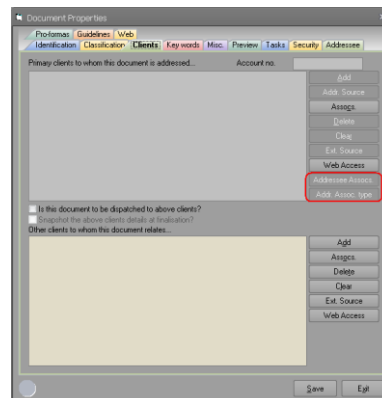


- In client synchronisation process, when addition of a client fails, all of the records that were added get deleted apart from the record in ZZCLIENT. This leaves the client in inconsistent state. The synchronisation process is changed to delete the record from ZZCLIENT table when addition of client record fails.
- There have been reports that the synchronisation process intermittently fails when attempting to add records to ZZCLIBPY table. After detailed inspection of the source code, we have found no evidence of bug in the synchronisation process. This indicates that other factors may be causing these intermittent failures. We have added more logging information when this record is added to the database. We have also amended the code slightly and tests have shown that this slight change has overcome the bug. Nevertheless, it is a complete mystery why the original code was failing because the code still fulfils the same requirements.

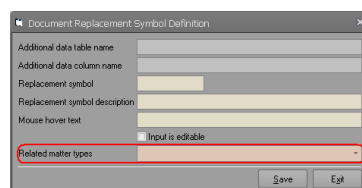


### *Modification as at release 10.00.06a*

- When generating letters, clients that letter is addressed to will reside in the addressee list in the addressee tab of the document properties. Synergy was not relating addressees to the document as related clients and hence the document will not be visible from the document tab of an addressee. In some cases, sites may want this to be the case. To do this, users will have to add the client to the addressee tab as well as adding them to the related client list. We have streamlined this by adding the same buttons available from the addressee tab to the client tab and allowing these buttons to add the selected clients to both the addressee list as well as related client list. To remove addressees added in this way, you need to delete them from the addressee tab.



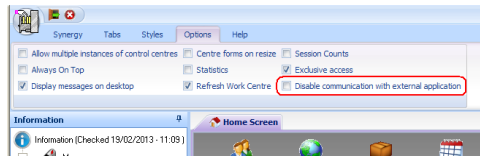
- When defining document replacement symbols based on matter additional data, often the additional data is stored against the matter that document is created from. However, sometimes, the additional data may be stored with a related matter. To avoid having to copy the additional data from the related matter, we have allowed the replacement symbols to copy data from additional data of a related matter. To do this, when defining the additional data replacement symbol, select the related matter type that additional data is stored with. Please note that for this to work; you must have a single matter related to the matter with the selected type and a single row of additional data.



- Selecting profiles with missing option in answers were not profiling the matter or client correctly when decisions were made. This bug is fixed on this release.
- Synergy provides STIPComm.DLL to third party applications to allow them loading matter and client control centres. Third party applications can use the methods in this DLL to load a specific matter or client. In this version, we have extended this facility to allow applications to specify a zero-based tab index. When passed, the requested tab will be displayed when the control

centre is loaded. Please note that the requested tab must be enabled and visible for it to be displayed.

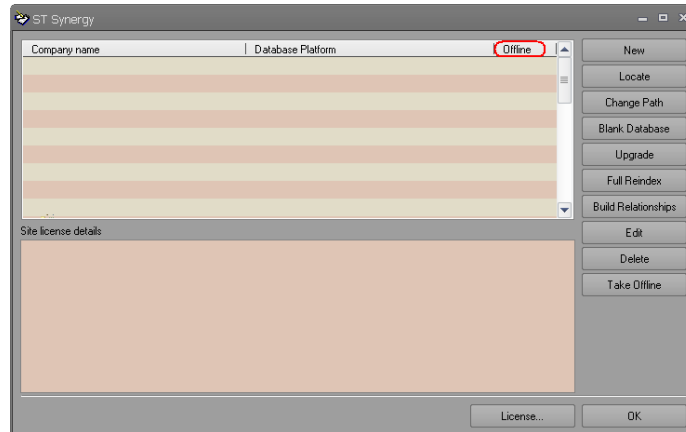
- When third party applications try to load a control centre in Synergy using the methods in STIPComm.DLL, all synergy sessions running on the machine will do load the requested control centre. Some users may only want this to happen on a specific session. To cater for this, we have added a new check box to the options tab of the Synergy ribbon bar to allow users to disable this feature (default is enabled).



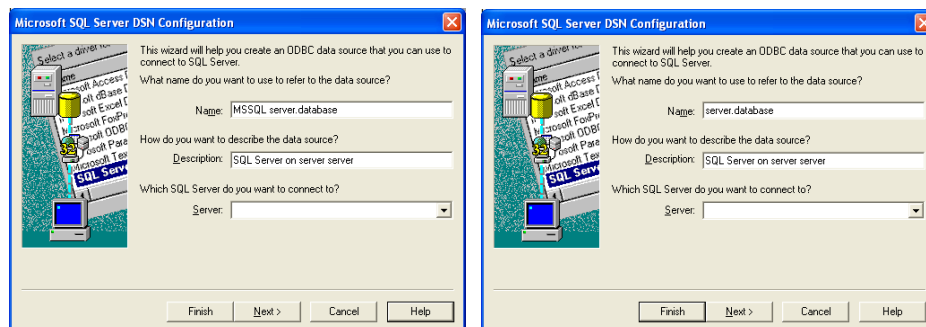
- Added ability to copy additional data to Software Development Kit using the DataExtraction object.
- Synergy allows any document to be copied inside master documents. Synergy was warning users if they did not have security clearance to use and copy these documents. However, the actual copy of the document was being done for all users with or without security clearance. We have fixed this bug in this version. From this version, if a user does not have security clearance to access a document, then s/he will not be able to copy the document inside masters through replacement symbols.
- There was a bug in importation and Synchronisation of external outlook Email messages with the MSG file. This bug will only be triggered if the message is linked to tasks and the task list has been changed since the creation of the message.

### Modification as at release 10.00.06

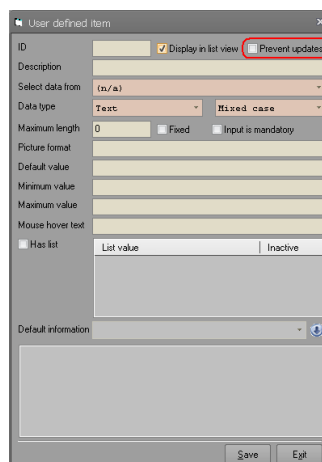
- In the previous version we introduced the concept of online/offline company databases. In this version, the online/offline status of the company database is displayed in the company maintenance form.



- We have changed the Data Source naming convention. In previous versions, the data source names for SQL Server had “MSSQL” as prefix. From this version, we have removed this prefix, therefore allowing 6 more characters to be used for server and database name combination.



- We have added a flag to additional data columns to allow Synergy to prevent the additional data column from updates. Software Development Kit has been changed to cater for this amendment.



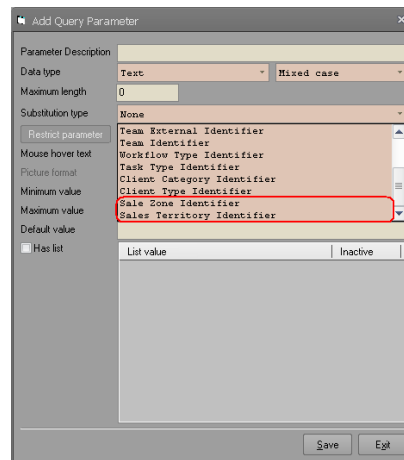
- ✚ In Software Development Kit, when applying a template to a communication object, it was not setting the primary classification from the template. In this version, the first classification marked as primary will be used as the primary classification if it is not set. If there are multiple primary classifications defined in the template, any one can be selected. If there are no primary classification defined in the template, one of the non-primary classifications will be used for primary classification.
- ✚ We have added a new method to allow tasks to be linked to a communication object in Software Development Kit.
- ✚ Fixed a bug in Software Development Kit related to getting a task with a specific status. This bug was caused by an incorrect SQL syntax.
- ✚ Added a method to the additional data column in Software Development Kit that will allow extracting the basic replacement information for the additional data column. We have also added a new property to get the prevent update indicator for the additional data column.
- ✚ We have added ability to set up default end date for recurring appointments. This can be done at the appointment category as well as appointment type.

The image shows two side-by-side screenshots of software dialog boxes. The left dialog is titled 'Edit Appointment Category' and the right is 'Edit Appointment Type'. Both dialogs have a similar layout with fields for 'External identifier', 'Description', and various recurrence settings. The recurrence settings include 'Daily recurrence date range', 'Weekly recurrence date range', 'Monthly recurrence date range', and 'Yearly recurrence date range'. Each has a dropdown menu for the recurrence pattern (Application default, Current week, Current month, Current year) and a numeric input field for the range. The 'End date' field in the 'Edit Appointment Type' dialog is highlighted with a red rectangle.

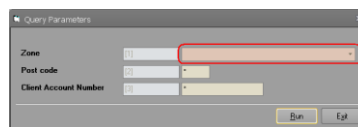
These setting will be used to determine the default end date for recurring appointments.

The image shows a screenshot of the 'Appointment Recurrence' dialog box. It has two main sections: 'Recurrence pattern' and 'Range of recurrence'. In the 'Recurrence pattern' section, there are radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly'. The 'Daily' radio button is selected. In the 'Range of recurrence' section, there are two date pickers: 'Start date' and 'End date'. The 'Start date' is set to '15/10/2012' and the 'End date' is set to '14/10/2013'. The 'End date' field is highlighted with a red rectangle. At the bottom of the dialog are 'Ok' and 'Exit' buttons.

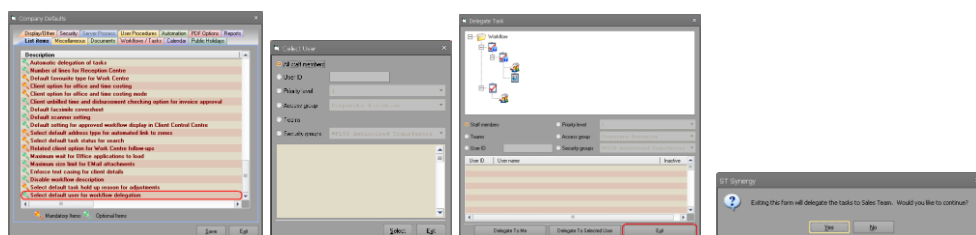
- ✦ We have added ability to define sales zone and territories, profile category and types as query parameters.



- ✦ In this version, the dropdowns in the query parameters form will automatically adjust their width to their contents.

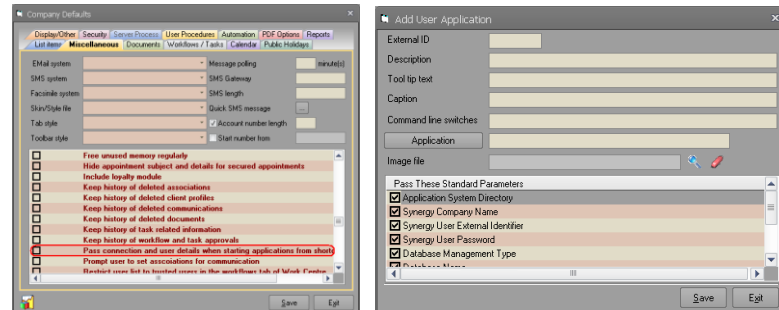


- ✦ In many occasions, users may click the exit button when delegating tasks during processing of a decision. In these cases, the task will not appear in anyone's Workcentre. To avoid this situation, we have allowed a default user or team to be set at the housekeeping form. This user/team will be used for the delegation if users click the exit button. Please note that a warning message will appear telling the user that tasks will be delegated to the default user before this is done. Please note that the delegation will be added if the user is an active user. For inactive users, the system will behave as before and the task will be left with no delegation. Any type of user can be selected for this setting.

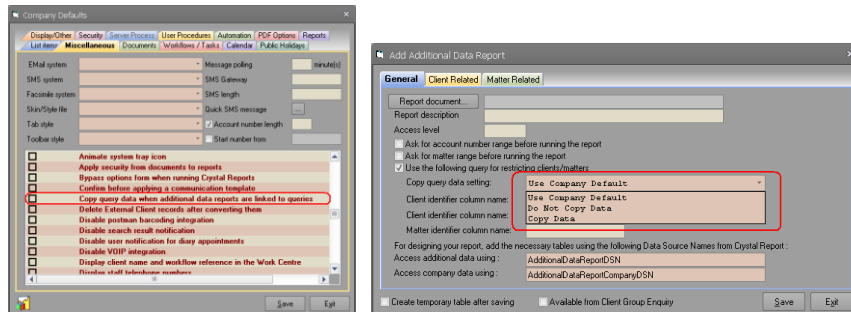


- ✦ In previous versions, additional data rows were deleted first before any updates are applied. In this version, we have amended this approach to make it more efficient by only deleting those additional data columns that needs to be deleted. This would provide a better performance when additional data rows are manipulated.
- ✦ In previous versions, we introduced a housekeeper setting that allowed connection details to be passed to application initiated from the shortcut bar. In this version, we have made this more flexible by taking this to the user

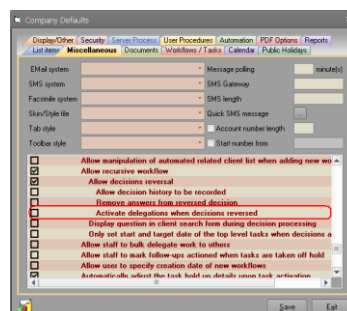
application itself. This way, each application can have its own setting. To do this globally for every user and every user application, use the housekeeper setting. To be more selective, turn this setting off in housekeeping and use the user application level setting. At the user application level, users have finer control as to what should or should not be passed.



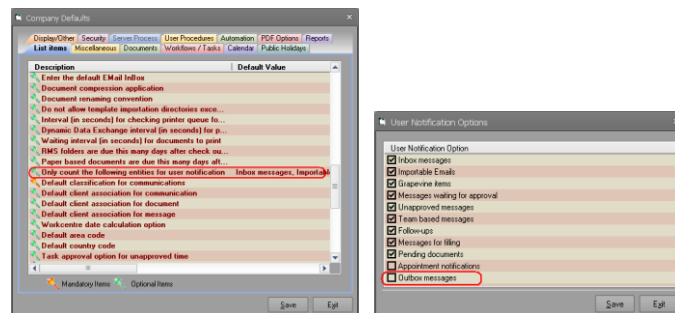
- In previous version we introduce a housekeeping setting that allowed the queries that run as part of additional data report to be kept and copied to the additional data mdb. In this version we have made this more flexible by allowing this setting to be stored at each additional data report level. The new setting provides three options, use company defaults, do not copy and copy. The first option allows Synergy administrators to control this globally using the company defaults option. The other two options, allows finer control at the additional data report level. The default is set to use company default to preserve the previous system behaviour.



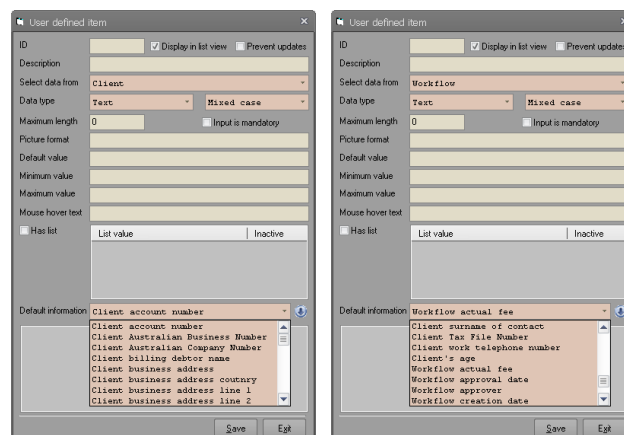
- All delegations are marked as approved when decisions are processed. However, when the very same decision was being reversed, those approved delegations were not being activated. A consequence of this is that the task will no appear in anyone's Workcentre. We have introduced a new housekeeping setting that allows sites to activate the top level delegation when decisions are reversed.



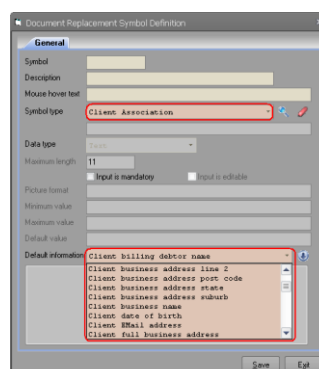
- We have added outbox to the list email folder that can be displayed on the Synergy shortcut bar. Default is off to preserve previous behaviour.



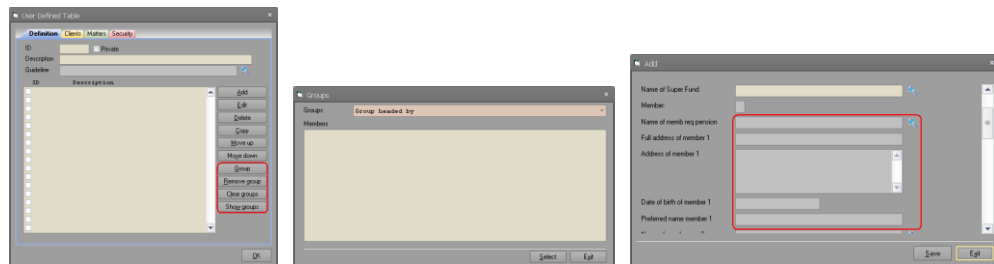
- We have allowed additional data linked to other entities to carry information about the type of data that should automatically be used for filling the additional data column. Multiple fields could be used to fill the additional data and their order can also be customised. Different entity types will allow their own relevant information to be used. For instance, for workflow related addition data types, users can use workflow information in addition to client information. This change has been applied to the Software Development Kit.



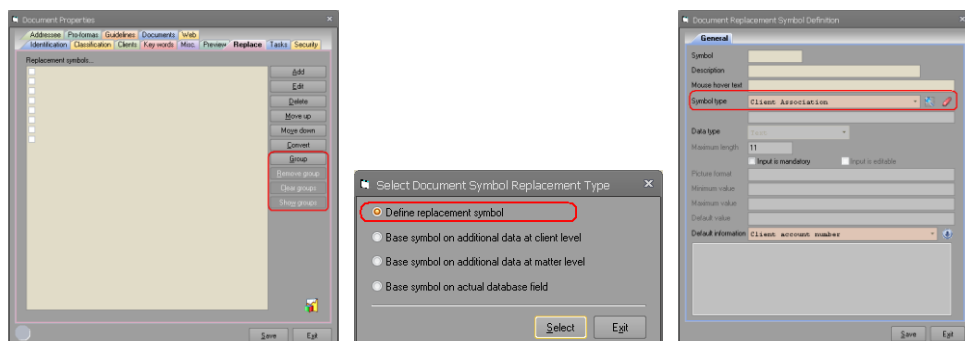
- Similar to additional data, we have allowed document replacement symbols based on other entities to carry information about the type of data that should be used to fill the replacement symbol. Identical facility to additional data columns have been provided for document replacement symbols. Software Development Kit has been amended to cater for this modification.



- We have allowed the additional data columns that are linked to entities like clients, matters etc to be grouped together. This will allow users to search for an entity once and fill out the required data for all the columns within a group from the selected entity. For example, you may have a name, address line 1, suburb, state and post code additional data columns that are linked to client. When you group these columns, the first column in this group becomes the group header. A search button will only be displayed for group header in additional data capture form. Once a client is selected by searching, then all of the relevant information is extracted and each additional data column will be filled appropriately. Please note that all additional data columns must have the same context that is you cannot group an additional data column linked to a client with another that is linked to a matter. Please also note that columns that are being grouped must have default information, otherwise grouping will not have any meaning. There is a button that allows user to inspect the groups. A new form will be displayed with all groups and as groups are selected, the columns within that group will be displayed. The image below right shows 5 additional data columns grouped together

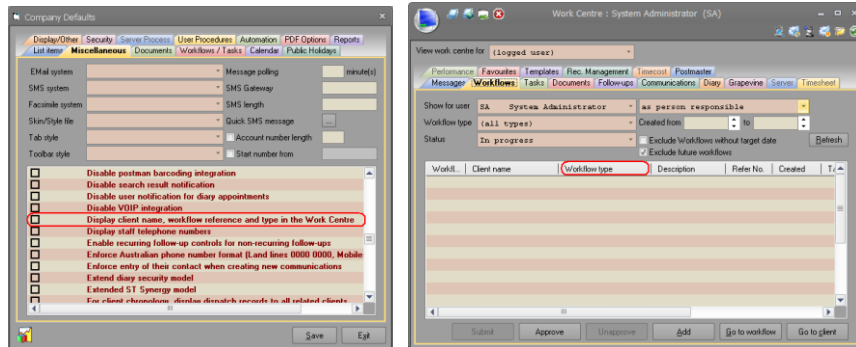


- A similar grouping facility to the above has been added to the document replacement symbols. Note that the replacement symbols based on additional data will carry their grouping from the additional data setting. For document replacement symbol, only those symbols that defined to be linked to client association can be grouped. Similar to additional data columns, those replacement symbols should also carry default information setting, otherwise there will be point in grouping. The check boxes on the replacement symbol list are only used for the grouping purposes. Upon selecting a replacement symbol, the entry will be ticked if the replacement symbol is allowed to be grouped. If the replacement symbol cannot be grouped, the entry will be deselected automatically. So if you see that you click an entry and nothing happens, it just means that the entry is not allowed to be used for grouping. Software Development Kit has been amended to consider column grouping.

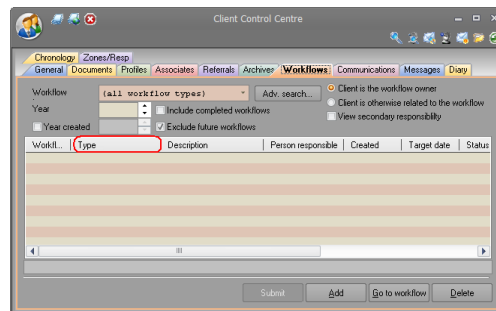




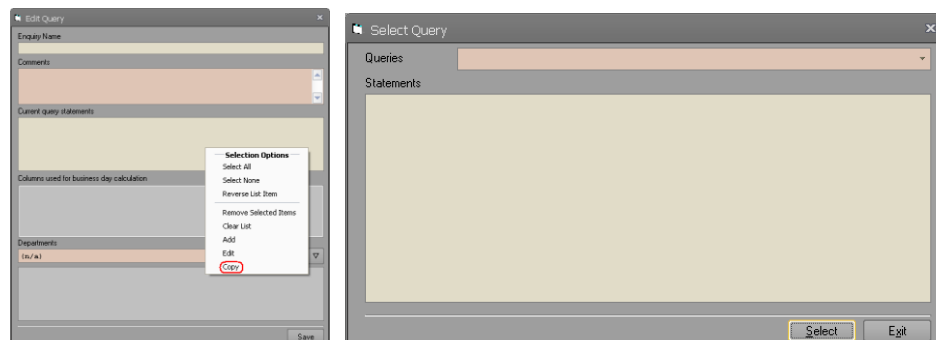
- In previous versions, we introduce a setting that allowed sites to display the client name and matter reference number in the tasks and matters tab of Workcentre. In this version, in matters tab, in addition to those columns, we are also displaying the matter type description. This column is placed before the matter description in the list. Given that Workcentre is a resizable form, it can be widened to accommodate all the information in the list.



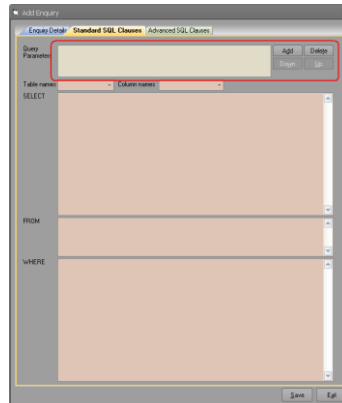
- We are now displaying matter type in the matters tab of the Client Control Centre. As a consequence, the matter reference number is now pushed outside the view.



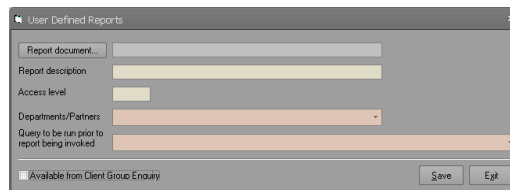
- When copying stored queries for creating new ones, the form that was allowing the selection of the new statements was not user friendly in terms of allowing user to narrow down the statements to a specific query. We have changed this so that users can select a query and then look at the SQL statements within that query. We have also made the form a bit larger to make it easier to see the complete query and statement names. Please note that the currently loaded query will always be at the top of the queries drop down and is called "Current Query".



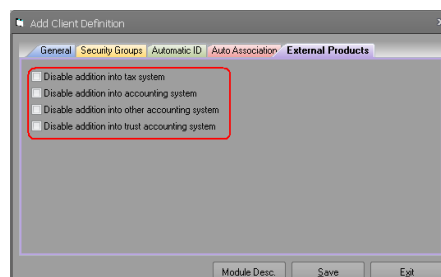
- ✚ In previous versions, when copying query statements, if the new query statement and the existing statements shared parameters, the parameters were displayed multiple times in the query edit form's parameters list. We have now made the parameter list to display distinct parameters.



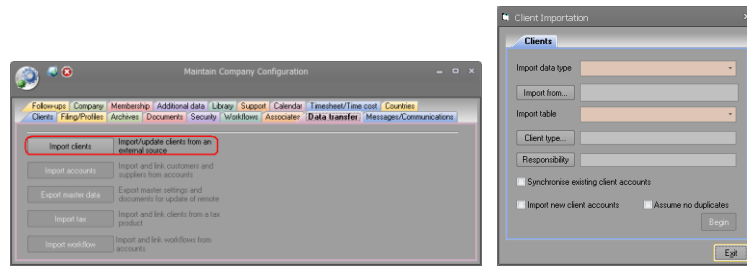
- ✚ We have also widened the user defined report creation form to allow long query names to be viewed.



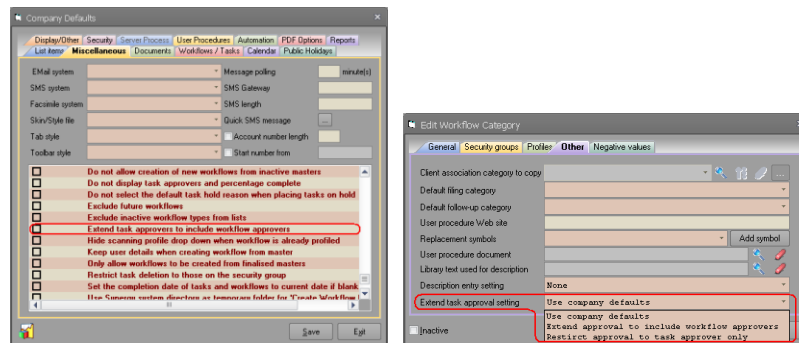
- ✚ Those customers that are using Synergy's accounting and tax product integration can now define what types of clients are allowed to be integrated with these systems. For instance, a business may decide that prospect type clients are not allowed to be integrated with the accounting or tax system until such time that they are converted to proper clients. In previous versions of Synergy, certain types of clients may this was impossible and hence prospects could by mistake be integrated to accounting and tax products. In a system like Elite tax, it is impossible to change the type of client once it is created in Elite. Consequently, when a prospects (which may have been defined as other client) is converted to a proper client (which may have been defined as company) changing the client type in Elite would be impossible. Software Development Kit is also amended to cater for this change. Please note that the “**External Products**” tab will only be visible if some external product integration is configured. Default is set to false to preserve previous system behaviour.



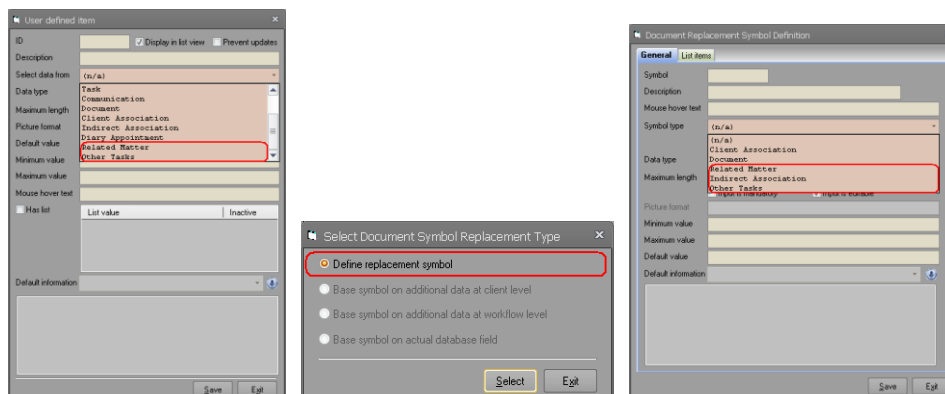
- We have improved the performance of the client importation from housekeeping.



- Synergy allows workflow approvers to approve any task within that workflow using a company wide setting. Some of our clients have requested for a finer control for this process. This feature can now be controlled at the matter type level if administrators wish to. There are three setting as indicated below; default is set to use the company default to preserve the previous behaviour. This change has been reflected in Software Development Kit.



- We have added two new “Related Workflow” and “Other Tasks” options to the entity types in additional data and document replacement symbols. We have also added “Indirect Association” option for the document replacement symbols similar to it additional data counter parts.



The other task option is useful when the additional data or replacement symbol is configured for workflow option. This will allow data to be captured from any task within the workflow.

Please note that when used for replacement symbol for documents, the displayed related workflows are dependent on the context that document is defined as. For those documents defined with the task context, the related workflows of the workflow that the document is being created from are displayed. Otherwise, all related workflow for the tasks that are linked to the document will be listed.

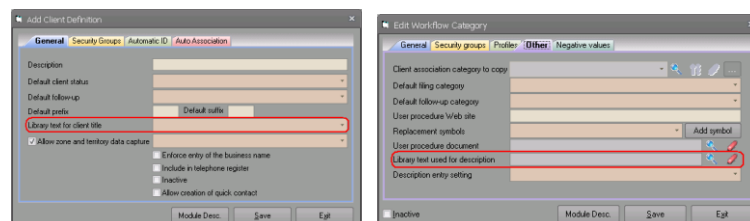
For additional data, when linked to workflows, only the related clients of the workflow that additional data is being linked to will be displayed. When used from client, all related workflows of any workflow that is linked to the client as primary client will be displayed.

If there is a single related workflow is found, the list will not be displayed since there is no choice for the user. If there is more than one workflow, then user will have a chance to select a workflow from the list. If there is no related workflow, the form will not be displayed and nothing will be extracted. You will need to ensure that at least one related workflow will exist.

All necessary amendments have been done to Software Development Kit to consider this change.



In previous versions, Synergy allowed a single library text category to be linked to client categories.



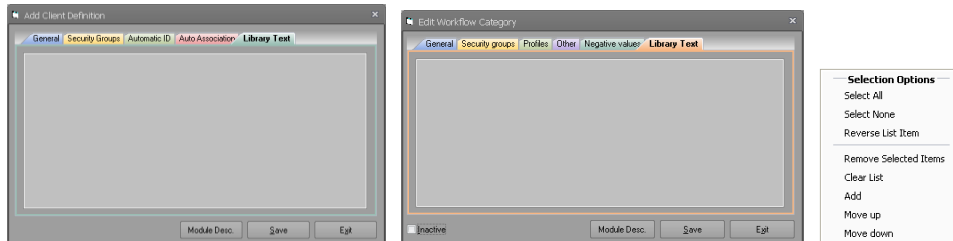
There are cases where multiple library text categories may be required to be linked to client categories to reduce maintenance requirement of the library texts. As an example, consider a car dealer. The dealership is in the business of selling cars. So they may decide to create a client category called “Car” regardless of the manufacturer. That will work well if the workflow for selling cars is identical. However, imagine that this dealership decides to create a different workflow for selling supercars like Ferraris, McLarens Lamborghinis than selling Hyundai. Synergy Administrator has no choice but creating two library text to cater for the requirements of the two distinct workflows and a single combined library text for the client type.

The reverse of this scenario is also possible, that is, it is possible to have the same workflow for selling supercars and Hyundai but the actual clients to be split up into two categories called “Supercars” and “Cars”. The situation would be identical, that is, you need two library text for client types and a combined single library text for the workflow.

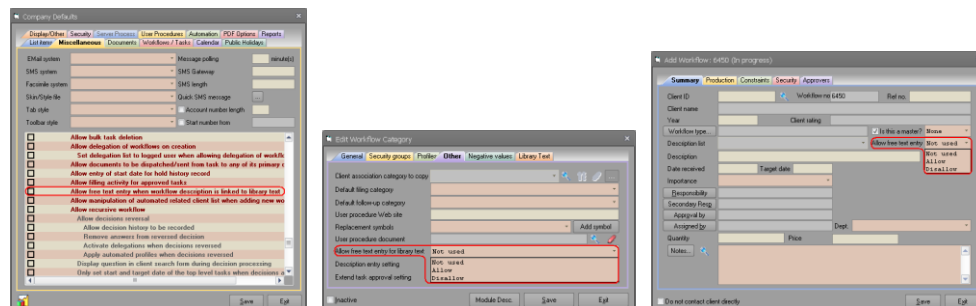
By doing this, every time, a new Ferrari or Hyundai model is added to the individual library text, they must also be added to the combined library text as

well. This increases the maintenance required to keep these library texts synchronised.

We have allowed multiple library text to be stored for client and workflow types. This way, there is no need for Synchronisation of various library texts. A popup menu will allow administrators to add library text and define in what order they should appear in the library text drop downs. All these changes have been applied to the Software Development Kit.



✚ In previous versions, we introduced an option that allowed the workflow description to be disabled when it was linked to a library text. This was done from the company default. We have made this feature more flexible by carrying this option to the workflow type as well as master workflow level. Obviously, the setting at the master workflow takes precedence to that at the workflow type and the setting from the workflow type takes precedence to housekeeping. All these changes have been applied to the Software Development Kit.



✚ When automated profiling is deployed for questions and answers, decision reversals may cause the automated profiles be out of synch with the configuration. This could be critical specially when a single profile category is used to determine a specific attribute of the workflow. We have added a new setting to the company defaults that allows Administrators to allow Synergy to apply automated profiles when decisions are reversed.

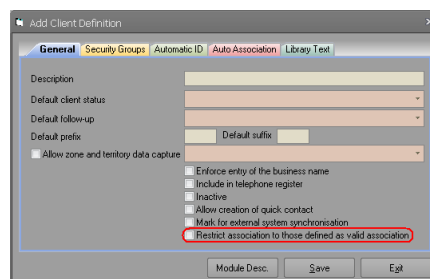


When this setting is turned on, Synergy will start from the parent node to the decision node being reversed. It will check the answers given to that task and to see if there is any answer that has automated profiling. If there are any, the automated profiling of the last given answer will be applied to the workflow. If there is no answer with automated profiling, Synergy will progress up the task tree node moving from one branch to its parent until it finds one. The search will be exhausted when an answer with automated profiling is found or the search reached the top of the current branch, that is, the task that is directly under the workflow node.

Please note that if a decision that is directly under the workflow node is selected for reversal, profiles will not be touched since there is nowhere for Synergy to go. In this case, profiles have to be maintained manually or left to be fixed when the task is approved.

- A few versions back, we allowed a set of valid associations to be defined in Synergy. However, if there is no setting for association between two client types, Synergy would allow any association to be created between the two clients. What this means is that when you are defining valid association for a specific client type, you have to define all valid associations between that client type and all other client types. If this is not done, the system will not find a valid association and will allow the association to go through. In many cases, you may want to restrict the associations to only those defined in association rules. This was impossible in previous versions. We have added a new flag at the client type level that allows restricting associations to those defined as valid associations. When turned on, the system will not allow the association to be created if the client types and association types for the association do not exist as a valid association. Please be careful when using this setting. If you turn this setting on and fail to define the association rules, no association can be created for this type of client.

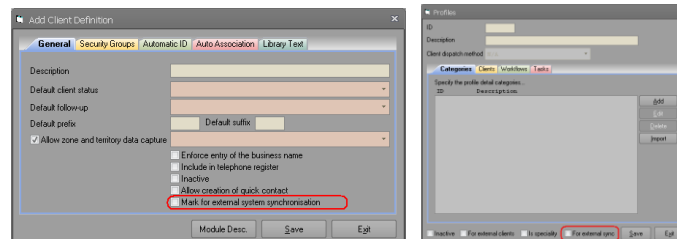
This change has been applied to our Software Development Kit. Please also note that we have changed the **Client Synchronisation Process** to consider valid associations as well as this new client type setting.

The image shows a screenshot of the 'Add Client Definition' dialog box in Synergy. The 'General' tab is selected. The dialog contains several fields: 'Description', 'Default client status', 'Default follow-up', 'Default prefix', and 'Default suffix'. There is a checkbox for 'Allow zone and territory data capture'. Below this, there are several checkboxes: 'Enforce entry of the business name', 'Include in telephone register', 'Inactive', 'Allow creation of quick contact', 'Mark for external system synchronisation', and 'Restrict association to those defined as valid association'. The last checkbox is highlighted with a red rectangular box. At the bottom of the dialog are buttons for 'Module Desc.', 'Save', and 'Exit'.

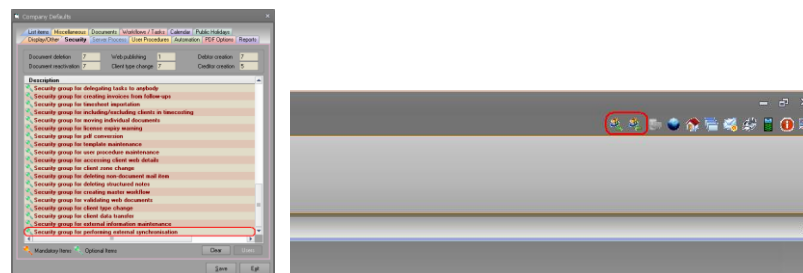
- Synergy clients can be exported into various file formats. Sites can export these clients, develop a web form that allows their customers to update that data and then bring the data back and Synchronise them to Synergy. For organisations with enough resources, our Software Development Kit could be used for this purpose. Sites could also use our Client Synchronisation Program for this purpose with some work. However, for sites that do not have the required resources or either of the above options, achieving this will

require use of features in different places in the system. We have combined this into a single press of button. The following facilities are provided for this purpose.

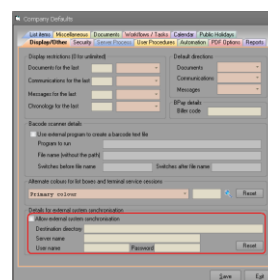
Administrators will be able to define which clients are to be exported for external system synchronisation at the client type level. We have also allowed selected profiles to be exported.



A security group will determine who can perform this operation. When this security group is define, the export import buttons will be displayed on the Synergy tool bar.



Administrators have to define either a network directory or a complete FTP details for this process in the company default form.



When this is done, the data will be exported to a Microsoft Access database ExtSynch.mdb. This database will then be compressed into ExtSynch.zip using standard zip compression format and then copied to the destination directory specified in the company defaults. If FTP details are entered, then compressed file will be copied to the FTP site.

When exporting data, a table called ZZCLIUPD is created with the client identifier and date and time column that is left as blank. External systems should enter the time stamp of when the data updated in this table. The UpdateDate and UpdateTime in the ZZCLIENT table should not be updated

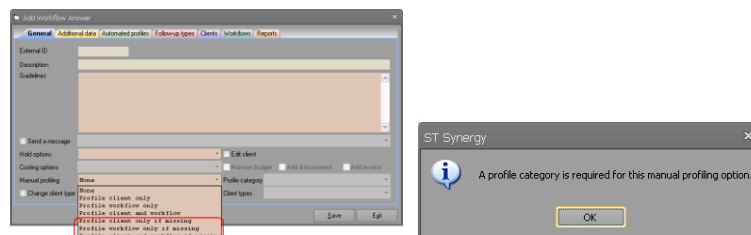
by the external system at all. These columns are used to detect if the data has been update internally after the external database has been created.

When using the import button, Synergy will expect ExtSynch.zip file in either the destination folder on the network or the FTP site. The zip file is copied and decompressed in Synergy's working directory. Using the ZZCLIUPD table, all records that have been updated externally will be collected. Out of these records, those clients with identical UpdateDate and UpdateTime in Synergy and the external database will be considered for updates. Once all updates are applied to Synergy, the required data will be exported again as explained above and placed on the destination location.

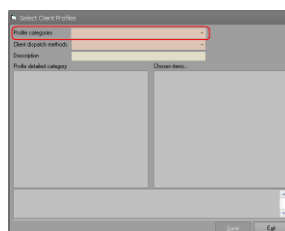
Please note that the profiles are never synchronised back to the Synergy database. These are simply exported for information only.

We may extend this feature in the future to include other related data. One such extension could be to extend this process to update accounting systems if Synergy is linked to any accounting system. At this stage this is not part of the process.

- ✚ Synergy allows manual profiling of clients and workflow when decisions are made. There could be cases where there would be no need to manually profile a client or workflow if already have a profile from the selected profile category. In previous versions there was no facility to bypass the profile form in these cases. We have added three new options to the manual profiling corresponding to the previous three options. These new options will allow bypassing of profile form. Please note that when selecting the new options for bypassing the manual profiling, a profile category must be selected, otherwise there is no way of checking. An error message will be displayed if the user forgets to select one.

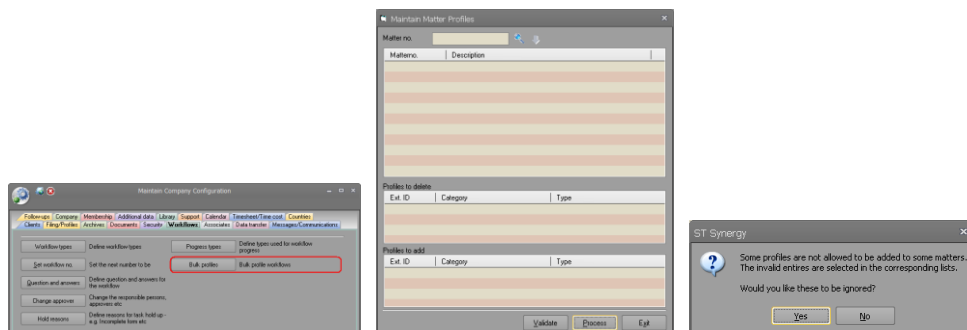


- ✚ Manual profiling form was being displayed even when there was no profile category in the category drop down. In these cases, there is no way that a profile can be selected. Consequently, we have avoided the display of the form if the category drop down does not contain any entry.

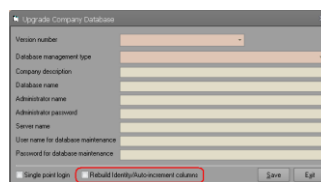




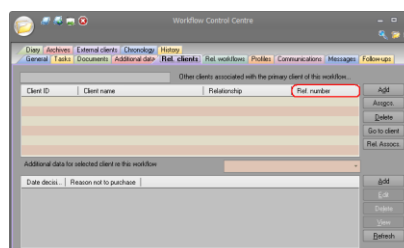
- Added ability to bulk profile matters. This can be done from the Matters tab of the Housekeeping form. To delete profiles, you can select the profile categories as well as profile types. However, you can only use profile types for addition process. This form allows full maintenance of matter profiles. You can bulk delete, bulk replace and bulk add profiles to matters. The matter search form will enable you to search and select multiple matters. Please note that we have also added a popup menu for bulk selection of matters in the matters list of matter search form. You can use this form to build a complete list of matters for processing. Once all matters are selected and profiles are added to the relevant list, you can click the process button to start the processing. You can use the validate button to ensure that all the selected profiles for addition passes the system rules. Inconsistent matters and profiles will be checked as part of validation process so that user knows which ones are invalid. Validation is always done prior to the processing. In this case the user will be given the option of ignoring the invalid profiles.



- When upgrading databases, it may be useful to reclaim the wasted identity/auto-increment numbers on additional data tables since these primary keys are never referenced in any other tables. We have added a check box that allows administrators to force recreation of the identity/auto-increment columns and therefore reclaiming unused numbers. This check box is only visible when upgrading a database. Default is off to preserve previous application behaviour.

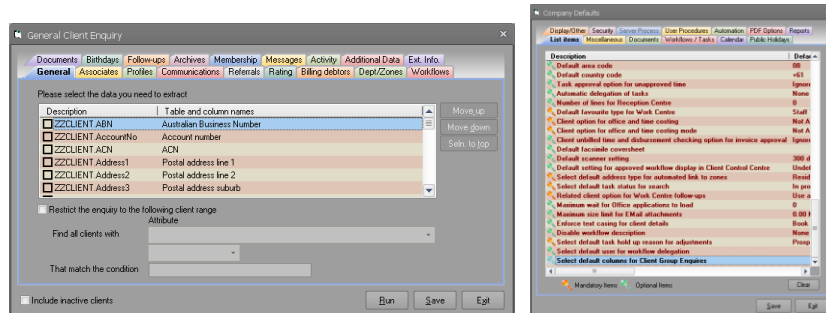


- We are displaying the reference number in the related client tab of the Matter Control Centre.

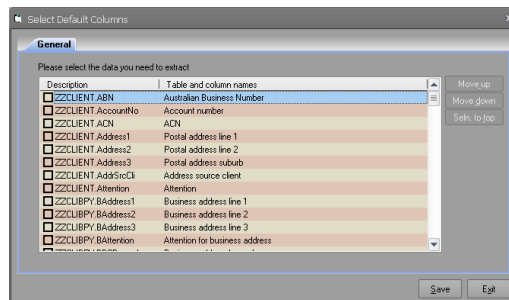




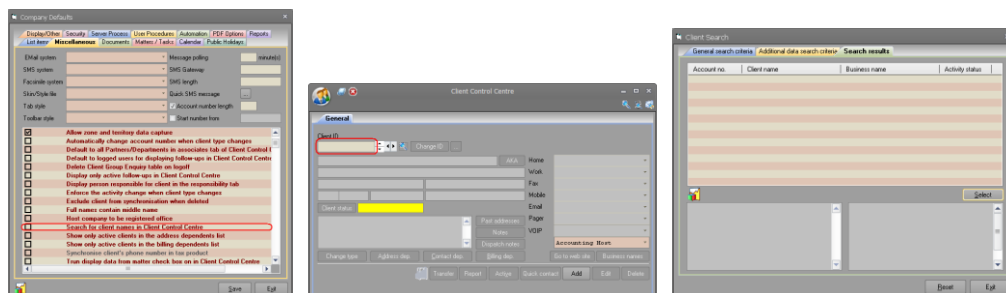
We have provided facility to store default columns for all queries run from the General Client Enquiry form. This allows predefined set of client information to be extracted for all queries. When default columns are configured, these columns will appear at the top of the table and column name list and will be disabled. Users cannot alter their order neither can they remove them from data extraction. They can only add to these default columns. The default columns can be set from the list items tab of the company default form.



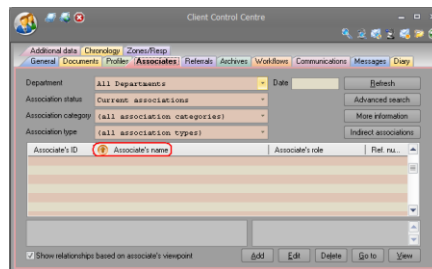
To select and order the default columns, a form will be displayed containing identical tables and columns available from the General Client Enquiry. Once the selection is saved, they will be used for any subsequent data extraction from General Client Enquiry form.



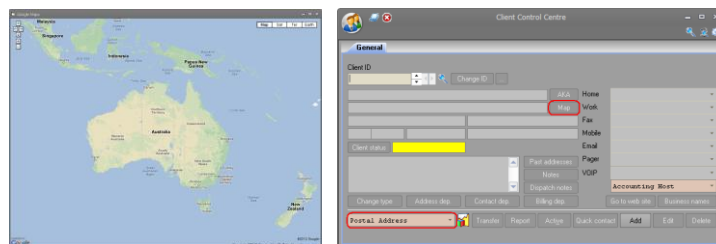
We have added a setting to the company defaults that allows sites to include searching client AKA in Client Control Centre. This setting will allow users to type in client names in the Client Control Centre and search by name. If there is a single client with the entered name, then the client will automatically be displayed. If there is more than one client, then the client search form will be displayed with the search result and user can select the correct client. Please note that client account numbers will always be checked first. If the entered string does not match any account number, then name matching will be used.



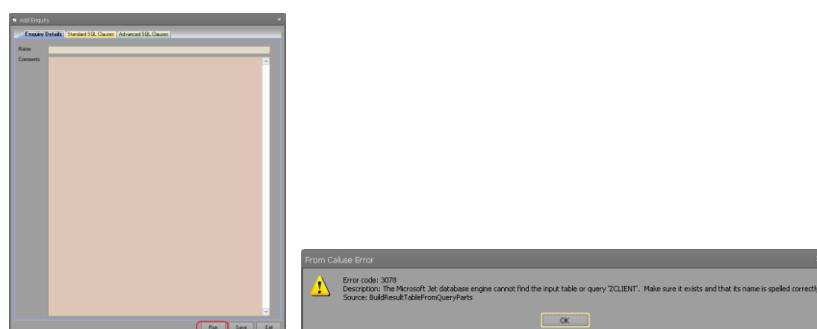
- In the associate's tab of the CCC, Synergy will now remember the list sort order as well as remembering which row was selected. Obviously, if the selected association is deleted, then, the selected row will be undefined and the first entry will be the one selected by default.



- We have added ability to see client addresses on Google maps. There is a new "Map" button that loads the street map in a new form. This form is non-modal form. Users with dual monitors can place this form on the second monitor and leave it open. As new clients are loaded into the Client Control Centre, the addresses will be located in this new form. When the address type drop down is changed, the newly displayed address will be located in the map. Please note that this form can stay open as long as the Client Control Centre is open. Upon closing the Client Control Centre, the user will be forced to close this form. It goes without saying that the feature will require internet connection.

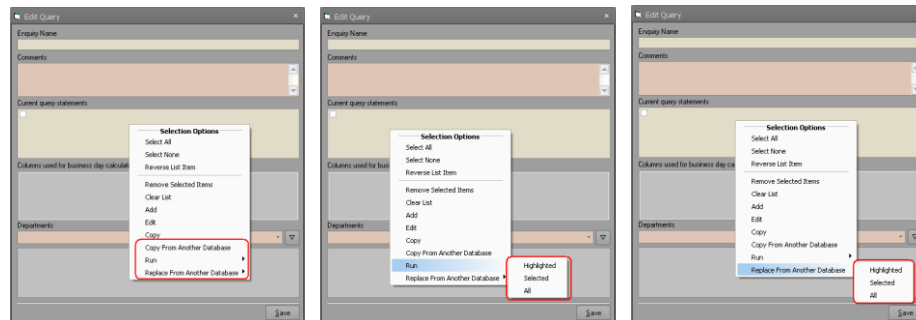


- Sometimes, it is hard to detect errors when developing stored queries. This is specially harder when there are multiple queries parts. We have added a new button that allows users to check for SQL Statement errors when building stored queries. Please note that Synergy tries to check each component of the query separately (select, from, where and having clauses). If it finds any error, the title of the error message will indicate which part the error is coming from.

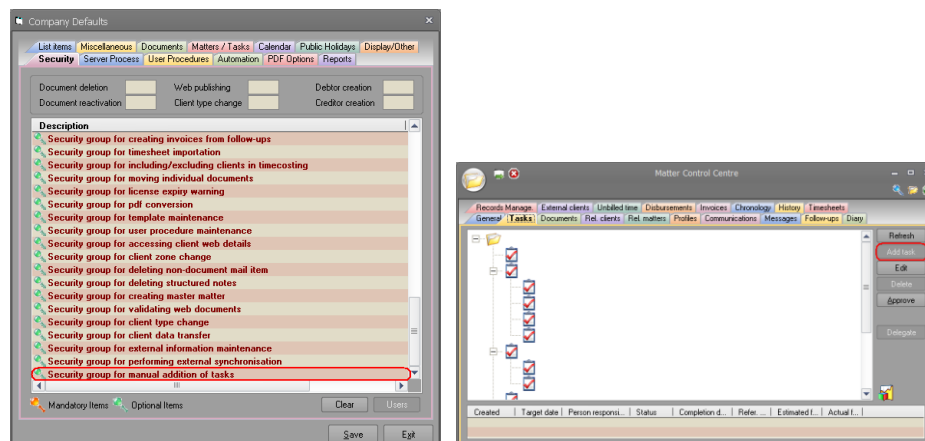


- We have added some menu options to the query maintenance form that allows users to check for SQL Statement syntax errors. This could be done using a single statement at a time, or by selecting a number statements, or by checking

all SQL Statements in the list. Please note that Synergy tries to check each component of every query separately (select, from, where and having clauses). If it finds any error, the title of the error message will indicate which part the error is coming from. The first SQL Statement with error will terminate the checking process. The statement with error will be highlighted to the user. We have also allowed queries to be copied or replaced from other Synergy.

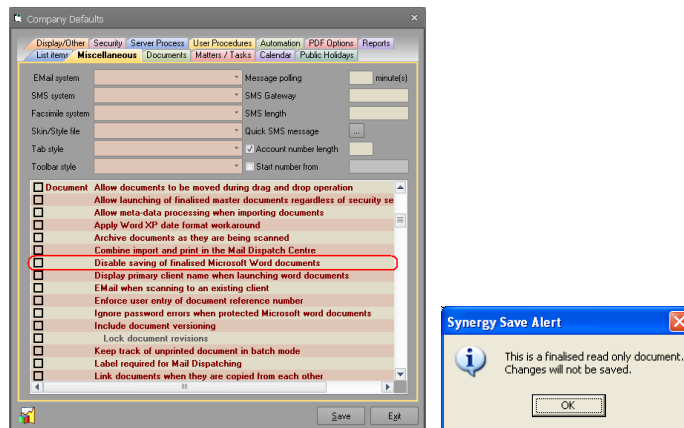


- When master workflows are used, Synergy Administrators may want to disable manual addition of tasks to workflows. We have added a global security group that controls who has access to manually add a task to workflow from the Task tab of the Matter Control Centre. In the future releases, we will make this more flexible by adding the same setting at the matter type as well as master matter level. When implemented, the security group at the lower levels will have priority over those at the higher levels. If this security group is not defined, everyone will have access to manually add tasks. When set, only users within the security group will have access clearance to do this. To preserve the previous behaviour, this security group is undefined when upgrading to this version.



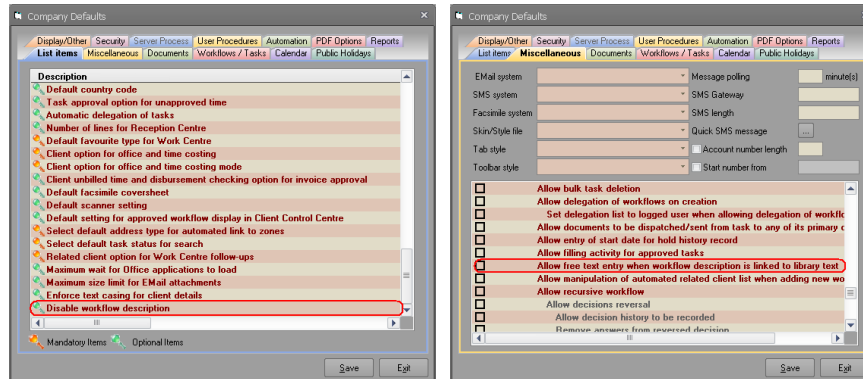
- Some customers have requested to have the ability to prevent users from changing the finalised documents. Most often users do not notice the ReadOnly on the Microsoft Word application title bar and make massive changes. When they come to save, they realise that the document is finalised. We have added an option in Synergy to allow finalised word documents to be protected from amendments when launched in Microsoft word. This will allow Synergy to warn users up-front. Please note that with this option turned on, the users will not be able to save or use the Save As menu option to save

the document somewhere else. Additionally, a warning will be displayed when the document is opened and every time save and save as menus are used.

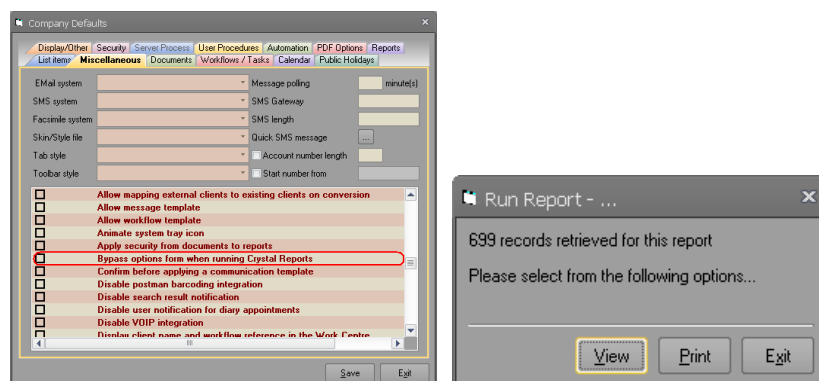


### Modification as at release 10.00.05a

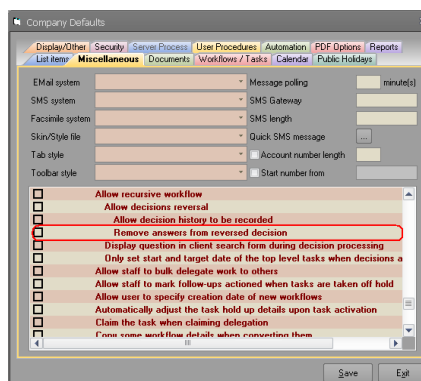
- With the introduction of the list items in HK for disabling of the matter description, the disabling of the matter description for those linked to library text was not working properly. This is fixed on this release.



- We have added an option to company defaults form to bypass the Crystal Reports option forms when running these reports.



- Synergy allows decisions to be reversed. However, when these decisions are reversed, the answer(s) for the reversed decision does not get deleted. This may cause issues for sites that are using relying on decisions to have no answers for their reporting purposes. We have added a new setting that allows sites to force Synergy to delete answers upon decision reversals. Please note that if you have configured to capture all answers for decisions, all of these answers will be deleted when the decision is reversed.



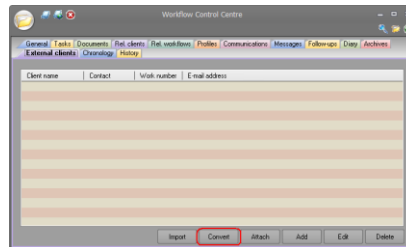
- Some report parameters were disabled in the report parameter form when loaded from the favourite tab of the Work Centre. This is fixed now.

- When a decision was creating a new workflow and setting up the workflow description, the matter add form was resetting it to blanks if the matter description was linked to library text and the HK setting was not allowing free entry of matter description. We have fixed this on this release.
- When importing external clients from HK, Synergy was deleting the selected profile type when the user was requesting a replacement of the existing external clients. This is fixed now.
- The importation of the external client from the external client tab of the Matter Control Centre was not displaying file types in the drop down. Consequently, it was impossible to import external clients to the system from there. This is fixed.

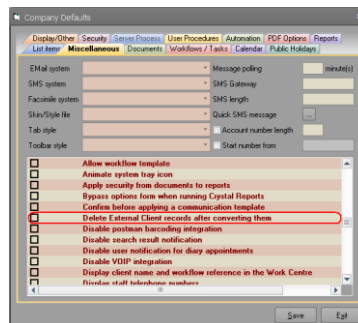
- We have changed the external client list view to a multi select list view in the Matter Control Centre.

- We have altered the deletion process in the external client tab of the Matter Control Centre to allow bulk deletion based on the check status of list entries. If no entry is checked, then the highlighted entry will be deleted.

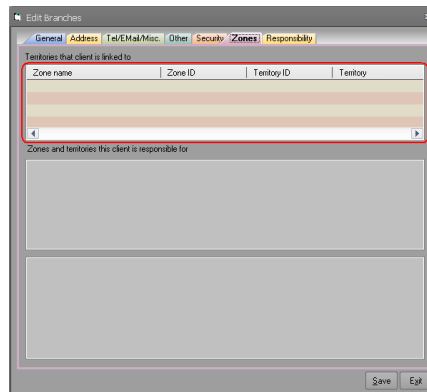
- ✚ We have added a convert button in the external client tab of the Matter Control Centre to allow bulk conversion of external clients to normal clients based on the check status of list entries. If no entry is checked, then the highlighted entry will be converted.



- ✚ We have added an option to company default to allow site to delete external clients after their conversion to proper clients.



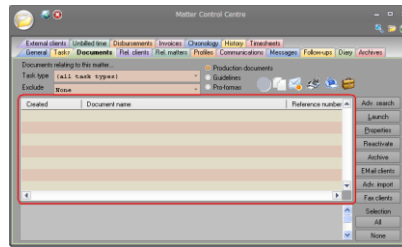
- ✚ When external clients were converted to proper clients, automated zoning was only working if postal address was used for zoning. This bug is fixed now.



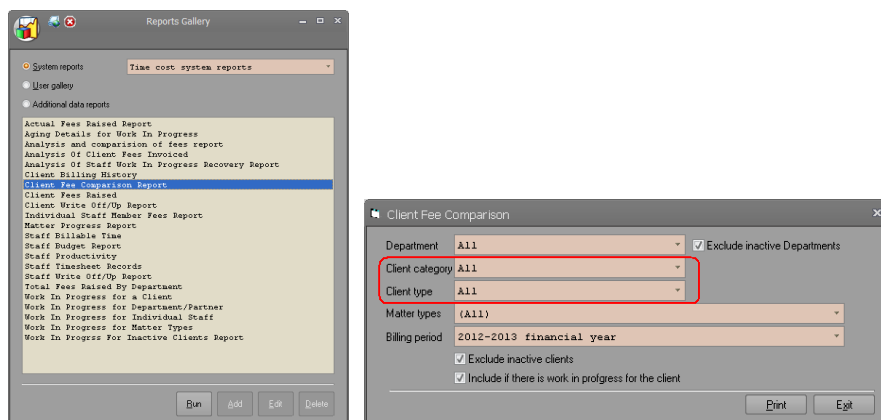
- ✚ Added a method to the Software Development Kit client object to return all additional data row identifiers in a collection to developers. This will allow developers to modify a specific additional data row.
- ✚ Added a method to the Software Development Kit client object to allow modification of a specific additional data row by passing a specific row identifier.
- ✚ Added a method to the Software Development Kit additional data object to return a column object using the internal column identifier. This will assist the developers to get a specific additional data column without having to loop through every column.



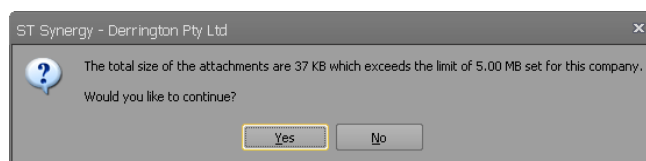
- The documents tab of the Matter Control Centre was not sorting the documents properly based on creation date. This is fixed now.



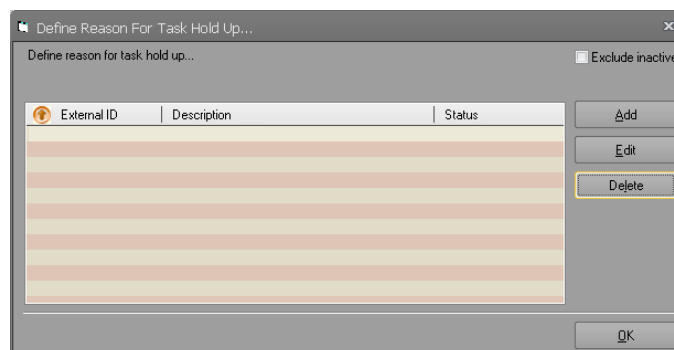
- We have added ability to select specific client types when client fee comparison report is run. Users can further restrict the report to clients with specific category or a combination of client category and type.



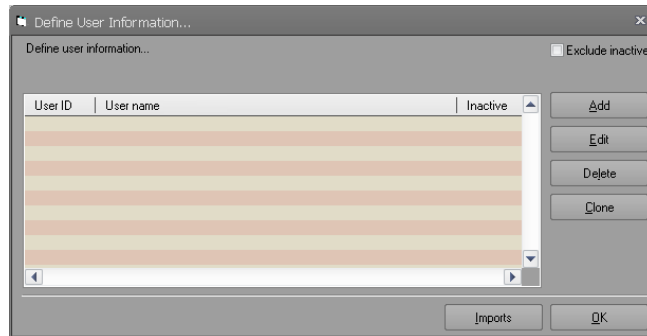
- When Synergy is configured to limit the attachment size for the email, it was warning the user even if the size was within the limit. This was because the comparison was not being done using the same size unit. This is fixed on this release.



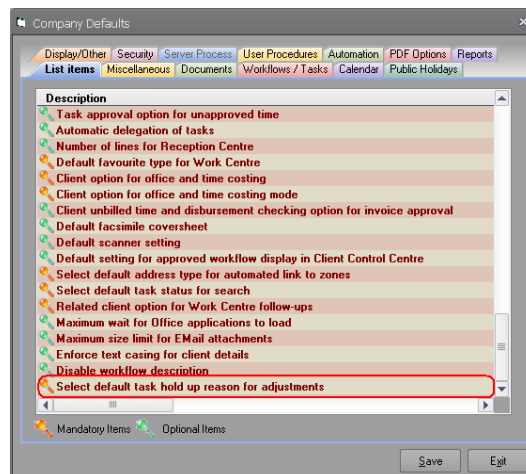
- Hold reason form is converted to a sortable list. We have also allowed to filter out the inactive entries should the System Administrator need.



- Using a housekeeper setting, Synergy allows only active users to be listed from the housekeeping form. However, in cases where there are too many inactive users, the Administrators may still need to see inactive users. Having to force them to turn this setting on and off is a bit unfriendly. We have allowed inactive users to be filtered out dynamically when the housekeeper setting is off.

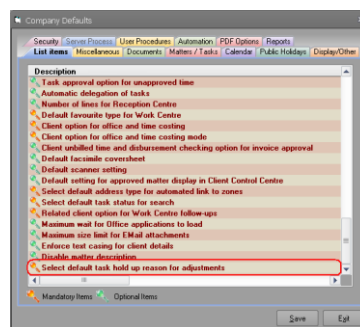


- Synergy allows users to backdate the start date of task hold. Also, when tasks are activated, on hold tasks are automatically taken off hold. Any adjustment to hold days will be added to the database. All these records use the default hold reason from the housekeeping. In some cases, the automated adjustments may require a different hold reason than the default one. In this version, we have added a new entry to the housekeeping that allows administrators to specify a different hold reason for these adjustments. This will be set to the default hold reason. Please change this should you require a different old reason.

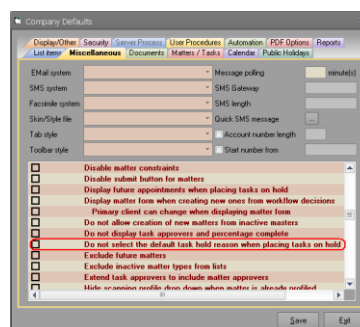


- There was a bug in client object of the Software Development Kit related to the account numbers. In add mode, when auto-id generation was turned on, it was always generating a new account number even when the developer was passing the required account number. We have changed this so that in add mode, any account number passed to the library will be used as the account number for the client.
- There were a few bugs in updating the additional data rows. These bugs have been fixed on this release.

- ✦ We have added a new method to the client object to allow addition of historical account numbers for a client. Please note that this method will always check the business rules and ensure that the account number is allowed to be added.
- ✦ CanChangeClientAccountNumber method was only validating the reason code and was ignoring all other errors. This bug is fixed on this release.
- ✦ In many cases, Synergy will have to automatically adjust hold records for tasks. In previous versions, there was a single default task hold up reason and using this reason for both normal and automated adjustments were confusing users. In this version, we have added a new setting to allow sites to specify a different hold reason for automated adjustments. This is located in the list item tab of the company default form. To preserve the previous behaviour, we are using the existing task hold reason in the absence of this new setting.

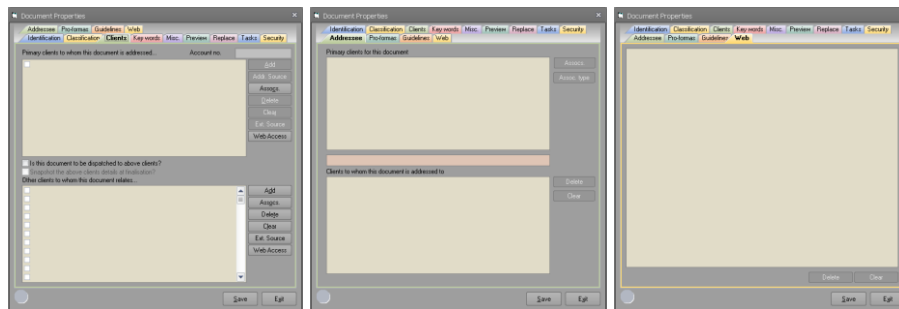


- ✦ When placing tasks on hold, the hold reason drop down will default to the task hold reason specified in the housekeeping. Because of this setup, in some cases users may just place tasks on hold without selecting the correct reason. We have added a new setting to the miscellaneous tab of the company defaults that will allow Synergy to leave the reason drop down without any selection. This way, when the users click the save button, if they have not selected a reason, they will be prompted to select the correct reason.

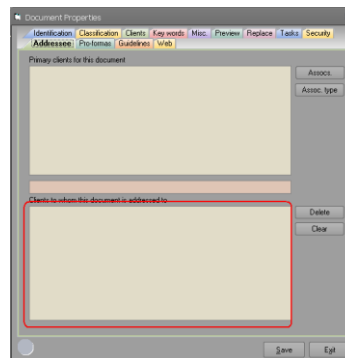


- ✦ There was a bug in upgrading Synergy databases from version V08.00.04 or earlier. This bug is fixed now. Hopefully we have no one still running these unsupported versions.
- ✦ We have added a new method called AttachDocument to client object in the Software Development Kit library. This should allow developers to attach documents to clients as related client for now. Please do not pass true as the fAsPrimary parameter because this has not been implemented yet and is reserved for future expansion.

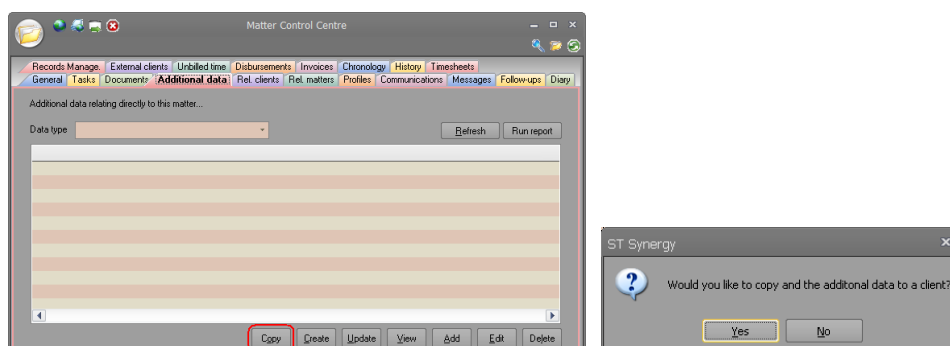
- ✚ We have added the client account number to the primary client, related client, addressee and web client lists in the document properties form.



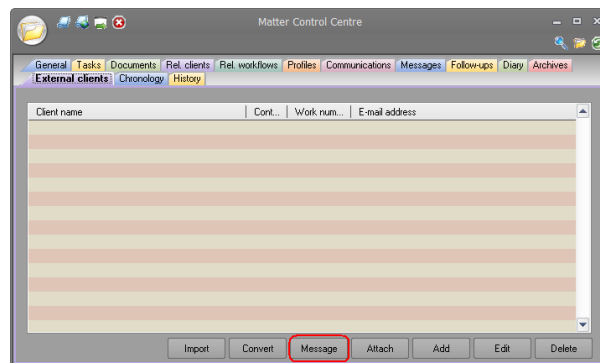
- ✚ When a document is marked to snapshot the client details, Synergy will copy the client, address source and all addressee details at the time of finalisation into separate set of tables so that the update of client details will not affect content of any merge field inside the document. When copying the addressee details, if the system is configured to ignore the client middle name, a concatenation of given name and surname will be copied as the name of the addressee. In some cases where the addressee does not have given name and surname, the title of addressee will be blank. We have amended Synergy to copy the title of the client when the given name and surname is blanks.



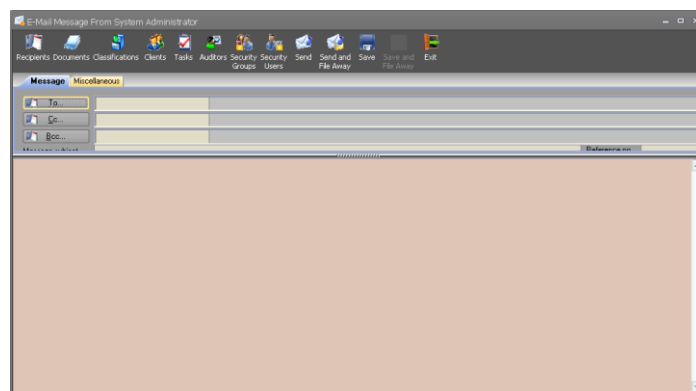
- ✚ We have allowed copying of additional data from the additional data tab of the Matter Control Centre to any other client and matter. The copy button will copy all of the selected rows from the additional data list. The user will be asked to specify whether the data is being copied to a matter or client and depending on the answer, proper search form will come up to locate the proper entity. All validation rules are applied before copy takes place.



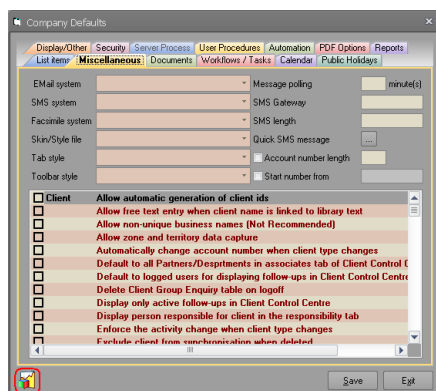
- We have allowed bulk email creation from the external client tab of the Matter Control Centre. Please note that only selected external clients having email address will be added to the email and will appear in the BCC list.



- There was a bug in the email form related to addition of external clients as recipients. This bug is fixed and you should now be able to add external clients as recipients to an email. The user has to select a task in the task tab of the Matter Control Centre first before s/he is able to create a message.



- We have added a new report button that will allow users to see the content of the list in the miscellaneous tab of the housekeeping. Please note that those setting that are off will not have a value in the On/Off field. Please copy the report file ZZHKMISC.RPT to your system directory.

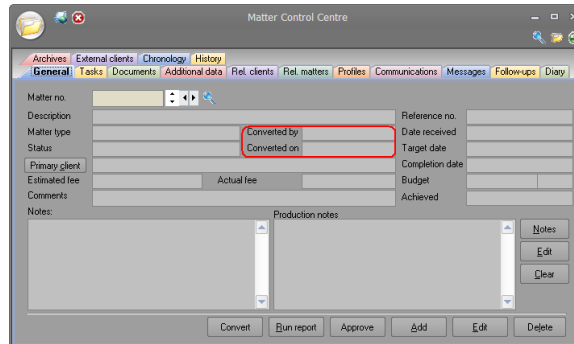


- We have added ability to attach a document to a task or client as related client in the document object within our Software Development Kit library

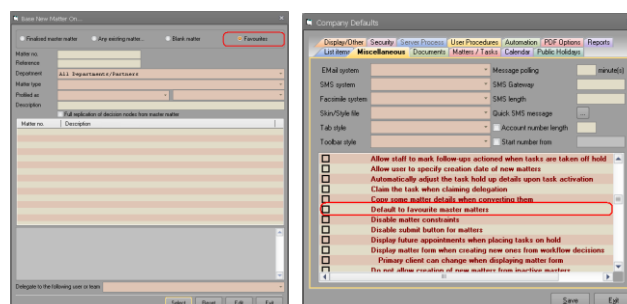


## Modification as at release 10.00.05

- When matters are converted, Synergy now keeps the details of when it was converted, who converted it and the matter number that was converted. The Matter Control Centre is also changed to display conversion details on the general tab.

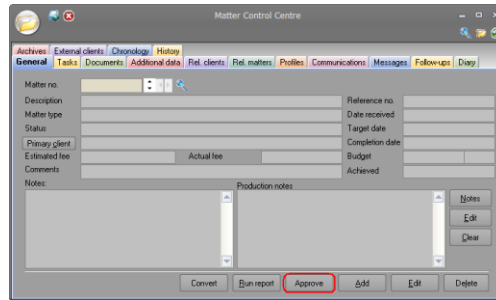


- When saving list values for a document replacement symbol, an error was coming up notifying the user that the list values were not being saved. This is fixed.
- When converting matters, the old matter could have a security group or user that is configured on the master matter that is used to create the new matter. In this case, Synergy was failing to convert the matter because it was attempting to create duplicate records in ZZMATSEC/ZZMATUSC. This bug is fixed in this version.
- We noticed a bug in deleting matters from user favourites. This bug is fixed in this version.
- We noticed a bug in display of clients in the favourites tab of the Work Centre. When selecting a client type, it was not filtering the clients properly. This bug is fixed in this version.
- There was a bug in creating document based on pro-forma documents from other tasks using "Base other" button. The document was being created properly and added to the documents list but in this case, it was trying to manipulate the pro-forma list which it should not have. This bug is fixed in this version.
- In version 10.00.00, we changed the favourites tab in Work Centre to display team favourites for each team member. However, the favourite buttons in client, document and matter search forms was still showing the user's favourites only. We have changed these forms to include the team favourites as well.
- Document replacement symbols report was not picking the correct mandatory field for replacements symbols based on additional data. This is fixed on this version.
- Number of master matters in a company will grow over time. To assist users in reducing the master matters in master matter selection form to those that user always uses, we have added a favourites button to this form. This will allow users to see only the master matters that have been added to their favourites and use the same tools to further filter the favourite master matters. We have also added an option to HK to allow favourites to be set as the default option.





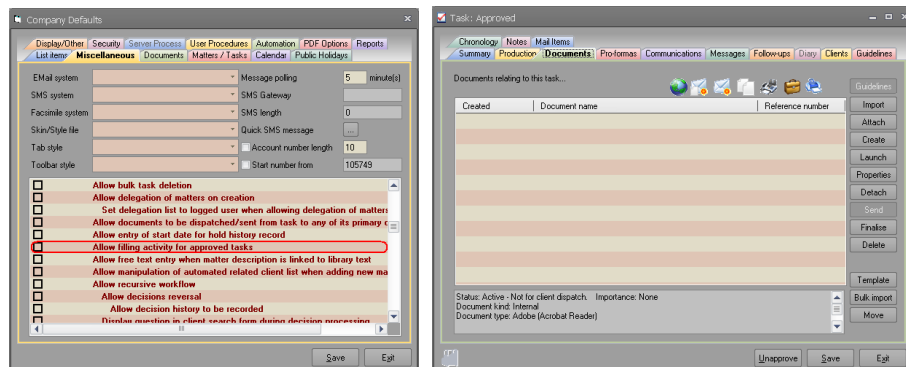
In some cases, the matters could be configured to have a team as approvers. This was meant to allow members of the team to approve the matter. In these cases, the Matter Control Centre was not displaying the “**Approve**” button on the general tab for team members. The only time that team members could see the approve button and approve the matter was when the team was added to the list in the approval tab of the matter as well. We have corrected this bug and amended the code to enable the team members to approve and unapprove matters regardless of whether the team is or is not in the approval list.



When approving the last task of a matter, Synergy would approve the matter if the user can approve the matter. The validation was not working when the approver of the matter was set to a team. In this case, Synergy was not allowing the team members to approve the matter. Consequently, the matter was being left as under review. This bug is fixed now.



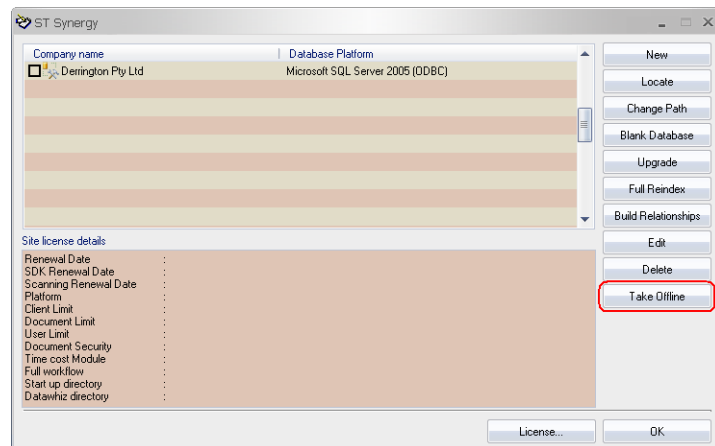
In many cases, matters get approved and later on, users may receive documents or phone calls or even messages that they may need to be attached to an approved task within an approved matter. In previous versions of Synergy, users had to unapprove the task, import the document or message or log the communication and then approved the task again. Alternatively, users can import the message or document and log the communication against the client and then using the task tab, link the required entity to the appropriate task. Either way, the approach is different and inconsistent with the way one would do these with active tasks. To keep things consistent, we have added a new setting to the housekeeping that will allow documents, pro-forma documents, communications and messages to be added and manipulated for approved tasks without having to unapprove them. This will allow people to be trained in doing things using a consistent approach (off by default to preserve previous behaviour). With this setting turned on, the controls on document, communication, pro-forma and messages tab of the task form will be enabled, allowing users to perform the required filling. Please note that on sites with time cost turned on, the time cost entries will be added as usual. Please also note that with this setting turned on, there are no guarantees that the dates for the entries will all be before the approval date of the matter.



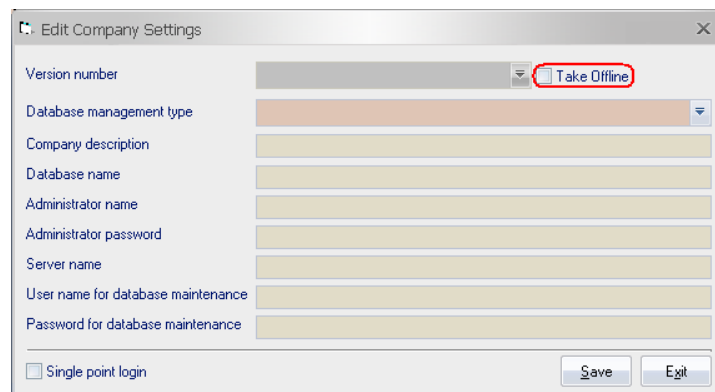




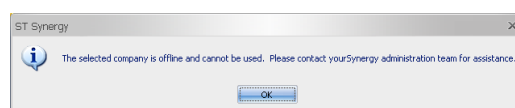
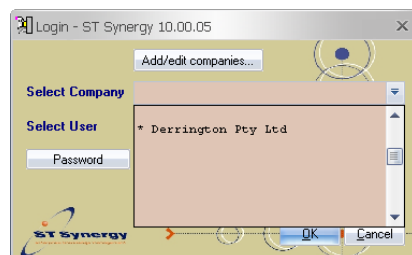
In many cases, Synergy administrators may need to do maintenance on their database and may require all users to be disconnected from Synergy and be unable to logon to the system once disconnected. Currently, this can only be achieved by turning license server off. We have introduced a new setting in the Add/Edit company form that allows administrators to mark a database as offline and hence preventing Synergy users from logging on to the database. Once the maintenance is complete, the database can be brought back online. Please note that when upgrading, doing full reindex or building the relationships, Synergy will automatically mark the database offline and upon successful completion will bring the database back online.



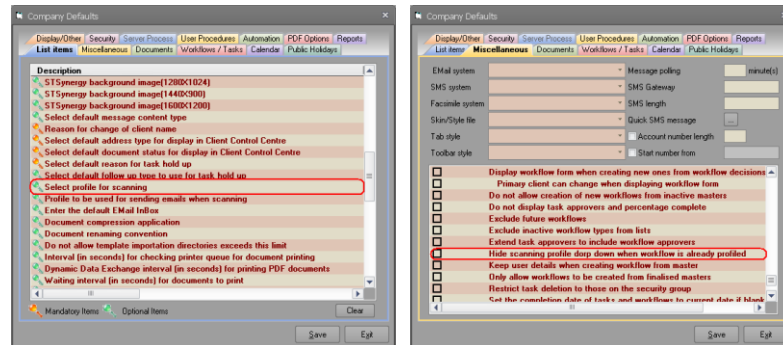
Taking the database offline and bringing it back on line can be done in two ways, using the “Take Offline” button from company maintenance form or clicking the edit button and then using the “Take Offline” check box from the edit form.



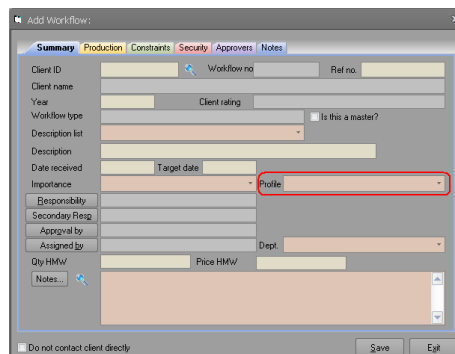
Please note that offline companies will be marked with an “\*” in the login form to distinguish them from the online companies. When an offline company is selected, a message will be displayed warning the user that the company is offline and cannot be used. Every control including the OK button will be disabled for offline companies.



- Structured notes can be attached to tasks, and matters. When they are created from within a task and then edited from Matter edit form or from Matter Control Centre, they were losing their link to the task. This bug is fixed now.
- Some sites use scanning profile to force users to profile a matter when they are created. However, in many cases, the master matter may be configured with the required profile which gets copied when the new matter is created. In these cases, Administrators may want to prevent users from changing the default profile that has been copied from the master. In previous versions of Synergy, this was impossible. However, we have added a new housekeeping setting to hide the profile drop down in the matter add form, if the matter already have one of the required scanning profiles.



Please note that this setting only controls the matter add form. It is not used anywhere else in the system. With this setting turned on, the profile drop down in the matter add form will be made invisible if the matter already contains one of the scanning profiles.

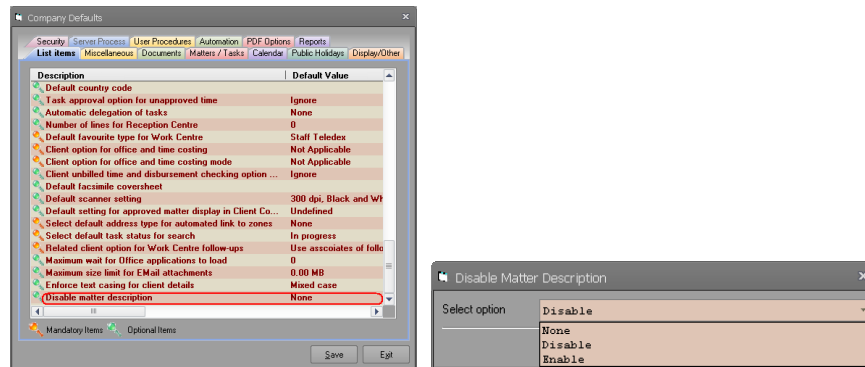


***Modification as at release 10.00.04a***

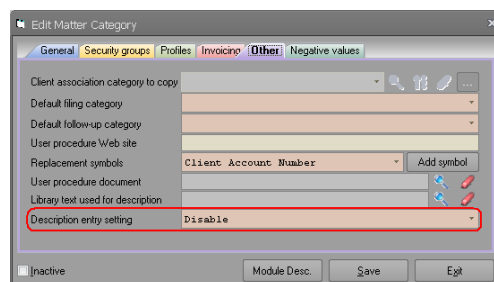
- ✚ Invoice documents were not launching. This bug is fixed on this version.
- ✚ Client association maintenance form was not loading when decisions were configured to maintain client associations. This bug is fixed on this version.
- ✚ Fixed an error in library text drop down for matter descriptions. It displayed two blank entries and as a consequence, the matter description was not being set correctly.

### Modification as at release 10.00.04

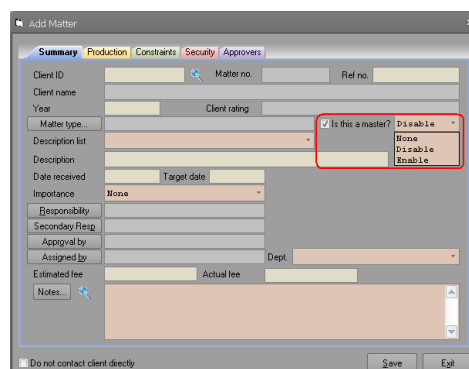
- ✚ We have added an option that allows entry of the matter description to be completely disabled. This setting will take precedence over the settings used for library texts. There are three options, “None” “Enable” and “Disable”. None means that this setting is undefined and other setting will take effect. When disable is used, the entry of the matter description will completely be disabled for all matters. Please note that this setting have no effect for master matters or when blank matters are created.



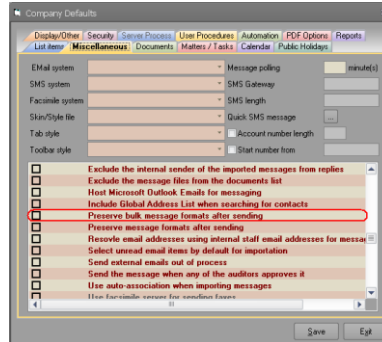
- ✚ We have allowed the above HK setting to be customised at the matter type level. Note that this setting takes priority over the HK setting. We have also change the user interface for this form to a tabbed interface to accommodate more controls.



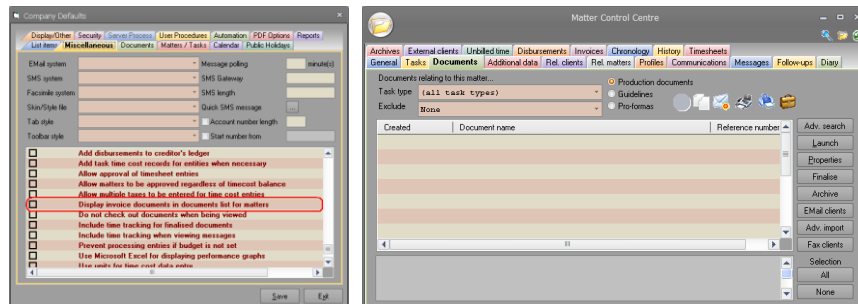
- ✚ We have further allowed the above two settings to be customised at the master matter level. When matters are created, they are linked to the master matter that they are based on. From then on, the setting on the master matter determines whether the description on the non-master matters can be modified or not. When a master matter is converted to a non-master, Synergy will break the links between the master and all non-master matters for ever. Restoring these links will be impossible. The user will be warned of this before the change is committed. This setting will take precedence over the matter type and HK setting.



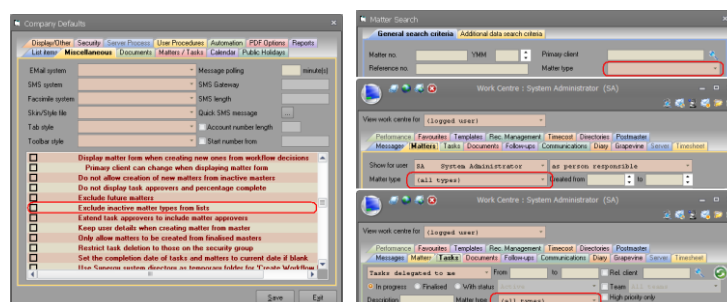
- Added three keys to the “Connection Details” section of the Software Development Kit test application INI file for developer code details (DeveloperCompanyName, DeveloperSerialNumber, DeveloperKey)
- When using email client feature, the sent emails may never be used for replies. In these cases, preserving email format adds unnecessary additional overheads. To avoid these overheads associated with preserving email formats, we have introduced a new HK setting that allows administrators to turn this off for these features. The default value will be copied from its counterpart for single emails “Preserve message formats after sending”. Thereafter, these settings will operate as unrelated be considered as



- When document replacement symbols were based on client association and indirect associations, in some cases, when users were selecting an associate, the details of the incorrect client was being displayed in the data selection form. This is fixed now.
- We have added an option to the housekeeping to allow invoice documents to be displayed in the documents tab of the Matter Control Centre. These documents were only accessible from the invoice tab in the past. Please note that when you have this setting on, then these documents could be selected and processed as part of email or fax client feature from that tab.



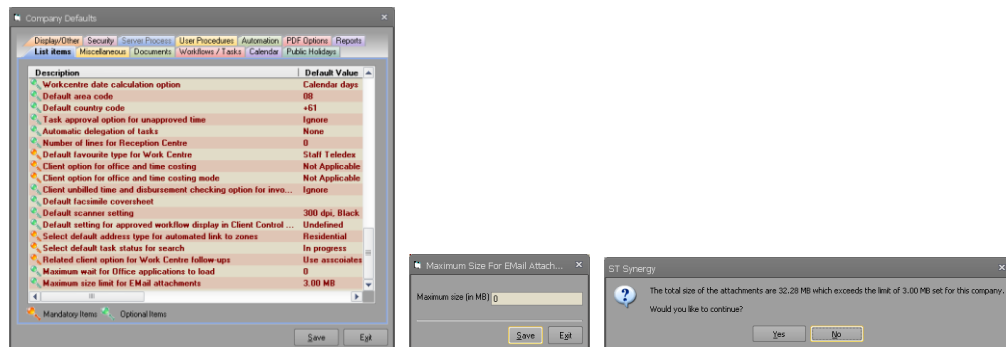
- We have added an option to the housekeeping to allow inactive matter types to be excluded from the lists that displays them. This setting is currently used for matter search screen, matter and task tabs of the work centre but could be extended in the future to include other areas of the product.



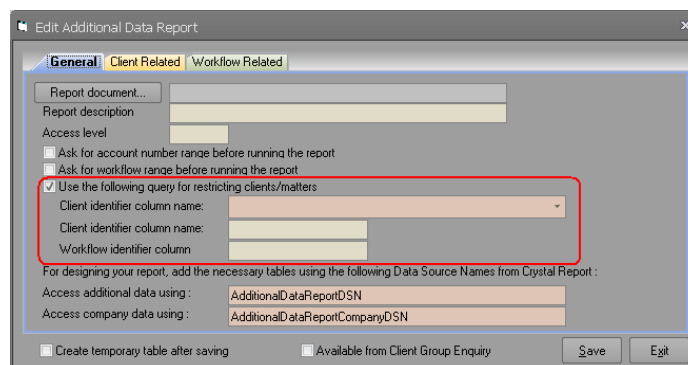
- ⊕ There were two issues in creating matters from Software Development Kit. Firstly, it was not considering the matter type setting for target date calculation of tasks. Secondly, when calculating target date for matter using housekeeper setting, it was using “Use Business Days” setting from the matter type rather than the housekeeper setting for calculation. Both of these issues are fixed on this release.

### Modification as at release 10.00.03

- ✚ The parameters for properties that were accepting collections in document import class in Software Development Kit have been changed from ByRef to ByVal. Consequently, those developers that are using languages other than VB6 may have change the way they are passing collection to these properties.
- ✚ Added detailed tracing for document importation within Software Development Kit.
- ✚ Added a maximum limit to restrict the attachment size for emails. Users often forget that emails cannot handle large file sizes. This will warn them if the total file size of all of the attachments exceeds this limit. The limit is always stored as MB.



- ✚ In previous versions of Synergy, all additional data reports were extracting everything from Synergy database before running the report. Although users were able to restrict the additional data extraction to a range of clients or matters, often this simple filtering is not adequate. In this version, we have allowed a query from stored queries to be linked to the additional data report. The purpose of linking the query to the additional data report is restricting the extraction of additional data rows to those records that exist as a result of running the query. This way, only additional data records that are required for the report will be extracted. Please note that when specifying a query, if you are extracting client related additional data, then you must specify a column name within the query that Synergy can use to restrict the additional data. This column must be the internal identifier of the client not the account number. Similarly, when extracting matter related additional data, you must specify a column that Synergy can use to restrict matters. This column must be a matter number column. When the additional data is run for a specific client or matter, or a range is specified, the query setting for additional data will be ignored. The queries will go through normal execution and will allow users to specify any parameters that query requires.



- ✚ In many cases, our customers run Synergy stored queries and export the resulting information into an Excel or other types of supported files. In these cases, it may be needed to have the extract data columns to be in a specific order. Despite the fact that

this can be done after the export to the external file, depending on the number of columns and the fact that this have to be done every time the query runs will make this a bit time consuming. One solution to this problem would be to change the order of columns in the stored query itself. However, doing this does not address one off data extraction cases. In order to assist our customers, we have allowed the extracted columns from the new enquiry form to be ordered on the form itself using the move buttons. Simply select the columns that need to be extracted by check marking them. Once this is done, click the “**Seln. to top**” button. This will transfer all of the selected columns to the top of the list in the same relative order that they appear in the list. You can then use the move buttons to order them to your requirements. Please note that the move buttons will only be enabled if the highlighted entry has a check mark. The “Seln. to top” button will only be enabled if you have at least one entry selected with a check mark.

Description	Table and column names
<input type="checkbox"/> ZZCLIENT.ABN	Australian Business Number
<input type="checkbox"/> ZZCLIENT.AccountNo	Account number
<input type="checkbox"/> ZZCLIENT.ACN	ACN
<input type="checkbox"/> ZZCLIENT.Address1	Postal address line 1
<input type="checkbox"/> ZZCLIENT.Address2	Postal address line 2
<input type="checkbox"/> ZZCLIENT.Address3	Postal address suburb

Buttons: Move up, Move down, **Seln. to top**

Find all clients with: [Attribute dropdown]  
That match the condition: [Text field]

☐ Include inactive clients

Buttons: Run, Save, Exit

When sites have more active users than their license allows, Synergy will popup a form and forces System Administrator to reduce the active users to comply with the number of user licenses. In the past, activation and inactivation of users could only be done by selecting individual users. We have extended this functionality to allow administrators to use teams for activation and inactivation. Please note that process of inactivation precedes the activation process. Consequently, when you are using teams and an active user is a member of two teams, if you inactivate one of these teams and activate the other team, this user will still be active. Member count on the team tab is the number of relevant users in that team. As you select the teams or users, the statistics at the bottom of the form will be updated to provide you an accurate figure of how many more users needs to be inactivated. If the statistics does not change when selecting a team, it simply means that all team members for that team are already part of other selected teams.

**Left Screenshot (Users Tab):**

Please select users that you would like to inactivate

User ID	User name	Inactive

Please select users that you would like to activate

User ID	User name	Inactive

You need to select 94 more users.

Buttons: Save, Exit

**Right Screenshot (Teams Tab):**

Please select teams to inactivate members

Team ID	Team Name	Member Count

Please select teams to activate members

Team ID	Team Name	Member Count

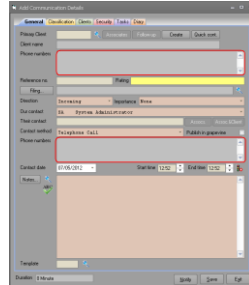
You need to select 94 more users.

Buttons: Save, Exit

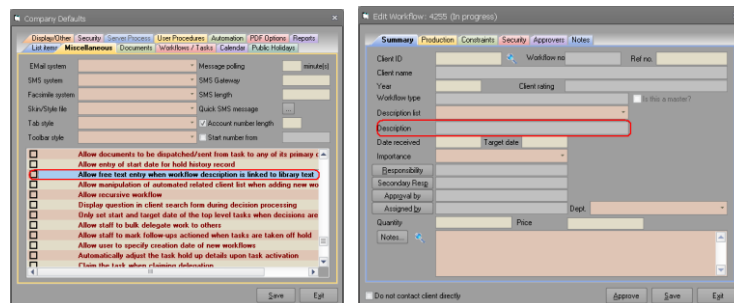




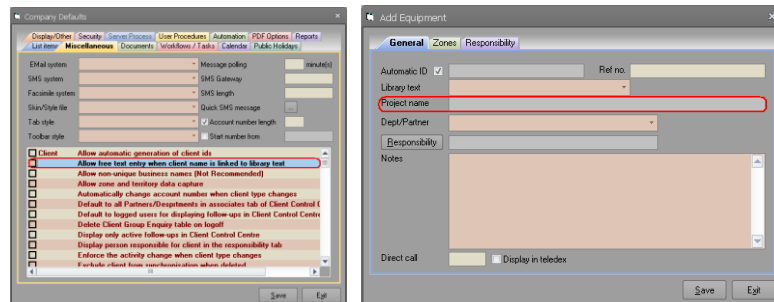
Increased the size of the text boxes that display the telephone numbers for the client and associate in the communication form. Also changed the order in which the details are displayed to mobile, work number, home number, fax number, email and pager. We have also removed empty lines, that is, if work number is blank, it will not appear in the text box.



Synergy allows administrators to link matter names to library text. However, this does not get enforced by the user interface. In many cases, users forget to pick a library text entry and this has introduced inconsistencies in matter descriptions. We have added a housekeeper setting to be used when matter types are linked to a library text. This setting enforces the selection of library text in the matter edit form. By default, this setting is on to preserve the previous behaviour of the application. By turning this setting off, Synergy will disable the matter description box in the matter form and will enforce the selection of the matter description from the library text drop down.



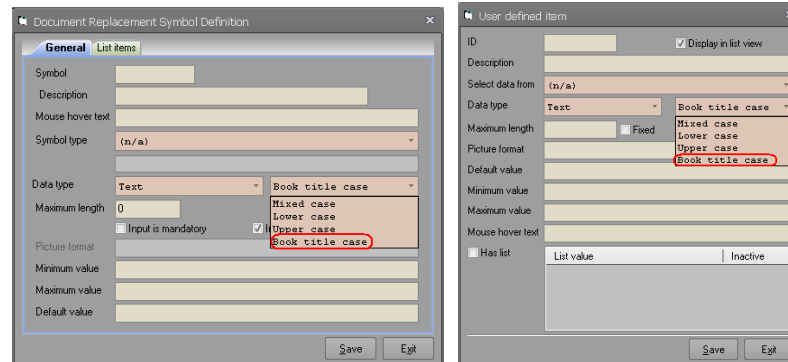
Synergy allows administrators to link client title to library text. However, this does not get enforced by the user interface. In many cases, users forget to pick a library text entry and this has introduced inconsistencies in client titles. We have added a housekeeper setting to be used when client types are linked to a library text. This setting enforces the selection of library text in the client edit forms. By default, this setting is on to preserve the previous behaviour of the application. By turning this setting off, Synergy will disable the client title box in the edit forms and will enforce the selection of the title from the library text drop down.



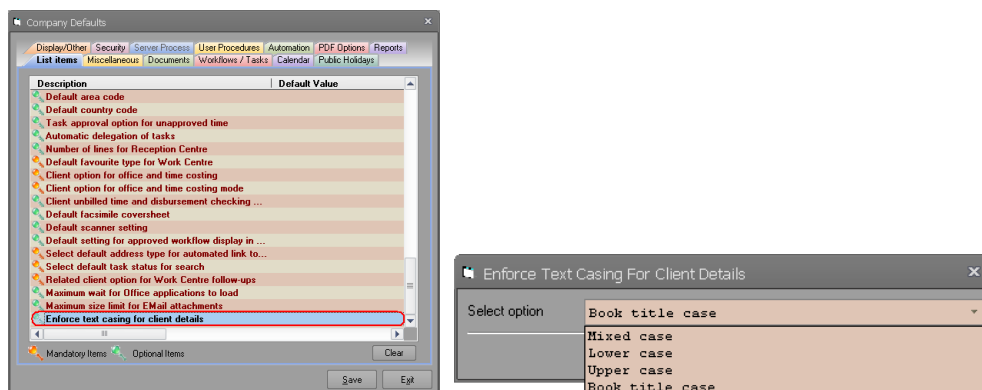


Added ability to define book tile casing for text based replacement symbols and additional data types. Please note that for this casing, the first letter of every word is converted to upper case. Each word of the entered text will only remain unchanged if the first character of the word is an upper case alphabetic character between “A” and “Z”. Any other character will cause it to be changed to book title. Example of the changes are as follows:

aPpLe will be changed to Apple  
 ApPLe will be left as is  
 1ST, 1St, 1sT, 1st will all be changed to 1st



Some clients requested to have a way of standardising and enforcing the entry of client details like names and addresses. In many cases, users may enter these with incorrect casing like jHoN sMith compared to John Smith. We have added a new setting in the list items tab of the company defaults form to allow administrators to specify the required text casing for client details (address and names). Please refer to previous release note for description of book title casing. If you will be entering names like Elvis de Costello, please avoid using book title casing because in this case, Synergy will convert it to Elvis De Costello. Software Development Kit and the client synchronisation process have also been amended to consider this setting. Please remember that state and suburbs are always converted to upper case. Selecting mixed case will leave the entered details as is without any changes. This mode is set as default to preserve the previous behaviour of the application.



Synergy was not enforcing a client title for project with address type clients. This bug is fixed on this version.

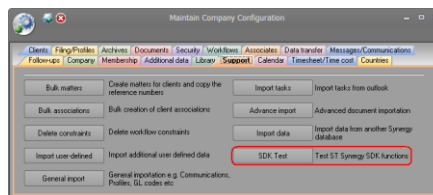


There was a bug in transferring client information. When active documents were being transferred, the addressee records linked to the old client was being left untouched. Consequently, after transfer of data, deleting client was not working. We have fixed this bug.

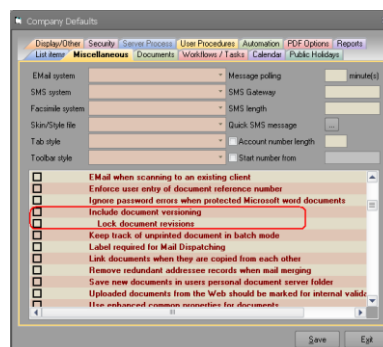
- ✚ When users had an excel file open, exporting timesheet entries to excel, was adding the data to the already open excel file rather than the new file. This is fixed now.
- ✚ In Software Development Kit library, setting a client's address source to another client was not setting the postal and residential address details correctly. The library was always relying on the calling application to perform these tasks and set the address details correctly. We have changed this. The Software Development Kit will now set the postal and residential address details from the address source client when it gets passed to the library. Please note that the address source will only change if the user has at least the view access to the address source client. If viewing of the address source client is secured, address source will be left unchanged. Developers should set the address source client identifier first and then can have access and display the new address details afterwards.
- ✚ In Software Development Kit library, setting a client's contact source to another client was not setting the contact source details. The library was always relying on the calling application to perform these tasks and set the contact source details such as given name, surname etc correctly. We have changed this. The Software Development Kit will now set the contact source details from the contact source client when it gets passed to the library. Developers should set the contact source client identifier first and then can have access and display the new contact source details afterwards.
- ✚ We have changed the Software Development Kit test application. In some cases, it was using client object to detect whether a client is in the database or not. We are now using the client search object for this purpose which should have been used in the first place because of the security settings.
- ✚ We have added WorkflowItemDescriptionList property to the workflow object in Software Development Kit that will allow developers to get a list of all library text entries that are linked to a matter type. We have also ensured that the description is validated against the library text before workflow items are created. We have also changed the user interface from Synergy as well as the Software Development Kit test application to include the library text.
- ✚ We have added ClientNameList property to the workflow object in Software Development Kit that will allow developers to get a list of all library text entries that are linked to a matter type. We have also ensured that the client name is validated against the library text before clients are updated. We have also changed the user interface from Synergy as well as the Software Development Kit test application to include the library text.
- ✚ We have added the ability to pass developer code details when testing Software Development Kit from within Synergy's housekeeping form. Without this change, sites would have had to run the license server all the time even when they had a valid developer code because there was no ability to enter these details.
- ✚ We have added the ability to pass developer code details when using Software Development Kit from the SDK test application. Without this change, sites would have had to change the code behind and enter the correct details there before running the application. Otherwise they had to run the license server all the time.
- ✚ Software Development Kit was attempting to calculate the target date of the matters from the master matter type. In many sites, Synergy is not configured for automatic target date calculation. In these cases, Software Development Kit was producing error even if developers passed the required target date. This bug is fixed on this release. We have also changed the Software Development Kit test application as well as the Software Development Kit test form from Synergy to allow the target date to be passed to the Software Development Kit if needed.
- ✚ We have matched the behaviour of the UseBusinessName property in the Software Development Kit with its equivalent checkbox in Synergy application. In order to assist developers to know when the client title and business name fields can be made enabled and visible, we have added two new properties called CanEnterClientTitle

and CanEnterClientBusinessName. Using this property, developers should make the client title fields visible and enabled when CanEnterClientTitle returns true. Similarly, the business name field should be made visible and enabled when CanEnterClientBusinessName property returns true. Developers should use the AllowedToChangeUseBusinessNameStatus property to determine whether they should allow status of their use business name check box to be changed.

We are not maintaining the forms that are displayed from the SDK test button from the housekeeping form in Synergy with the future changes to Software Development Kit. However, we will try to keep our sample Software Development Kit test application updated with the latest changes to Synergy and Software Development Kit. Please use this application for testing and demonstration. Please note that the buttons will still be there but the functionality will not be updated.

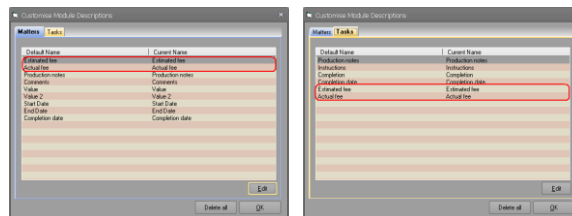


Many list entries in the miscellaneous tab of the company defaults are dependent on other entries in list. Given that the list entries in any category is sorted in alphabetical order, when the entry is not in alphabetical order, one could assume that that entry is dependent on an entry above it. To make this fairly obvious, we are now indenting these dependent entries to make it easier to work out which entry controls them.

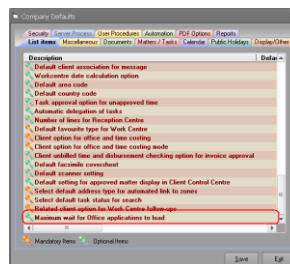


## Modification as at release 10.00.02

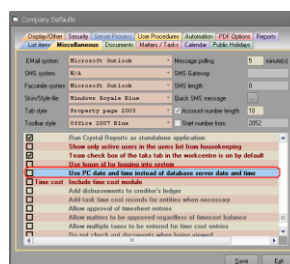
- Sometimes users rename certain fields (e.g. Estimated Fee etc) at the matter type level (in the matter tab of the module description form). They may forget to rename the same field at the task tab. In these cases, these fields will be displayed with their default value as defined in the task tab. However, users may expect to see the renamed value of the field from the matter type at the task level. We have changed Synergy so that if the common fields are renamed at the matter type level, they will be used even if users have not defined their equivalent for tasks in the task tab.



- Windows Server Operating Systems starting from Windows Server 2003 allowed certain user folders to be redirected to a network location. In these scenarios, the Office applications may have to load certain files from a network location. In some environment the overhead of loading these files from a network location is far too much and when OS returns the required Office object to Synergy, the Office object is not quite completed its initialisation and hence manipulating this object causes a run time error to occur. We have introduced a setting called “**Maximum wait for Office applications to load**” that allows sites to specify a maximum delay that Synergy will have to enforce before it can manipulate the Office object.

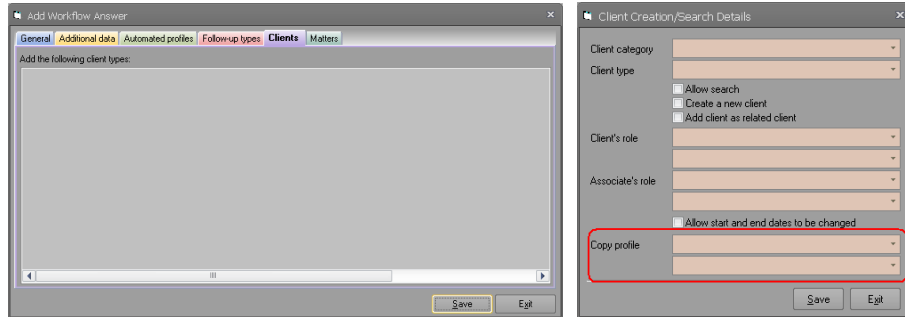


- Synergy uses a combination of the PC date and the date and time from the database server for its operation. This works well in most organisations. However, in organisations that have offices in different states and time zones, this may not work since the database server could be in a location with a different time zone to that of the user. We have added a setting that forces Synergy to use the PC date and time for all its operation. With this setting turned on, the date and time from the database server will not be used for storing any date time fields. Please note that turning this option on may affect display of data in some lists. Software Development Kit is change to consider this setting.

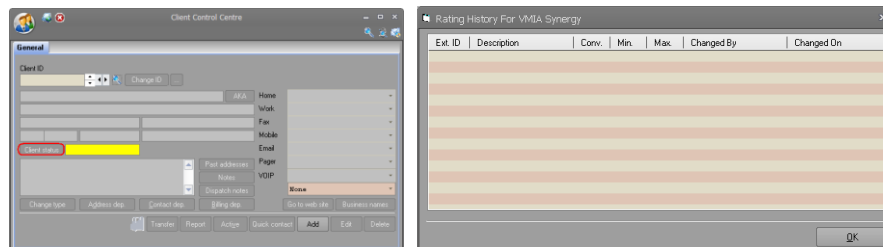




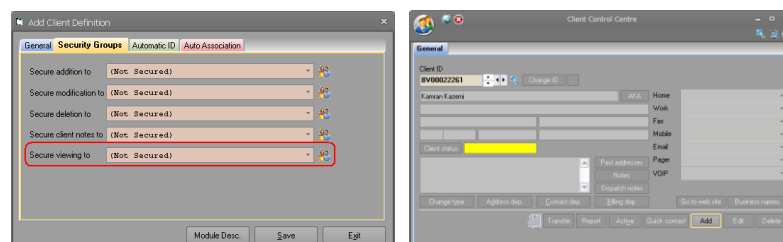
As part making a decision in the workflow, users could create or search for clients and associate them to the primary client of the matter. In some cases it is useful to copy profiles to the associated client. Although, one can force the user to profile the associated clients but given that the profile may already be attached to the matter, allowing profiles to be copied will reduce the user workload considerably depending on the number of associations and profiles. We have allowed profiles to be copied from matters to associated clients. This configuration can be done from the clients tab of the workflow answer form. Please note that Synergy will only copy the profiles that are allowed to be attached to the client at the time of copy. Those profiles that are not allowed to be copied will be ignored.



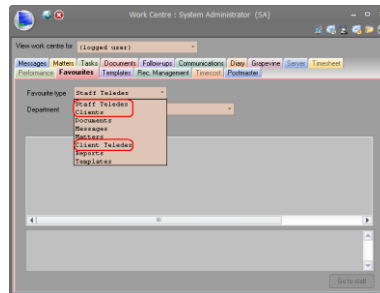
In some scenarios, organisations may want to keep history of client rating changes. We have now keeping the history of client rating changes. Please note that the conversion, minimum and maximum values are copied from the rating record to the history table at the time of change while external identifier and description never get copied across. Changes to the values rating record will not be synchronised with the rating history records after they have been added to the history table. We have also added a button to the Client Control Centre that allows viewing of client rating history. Software Development Kit has been amended to keep this history.



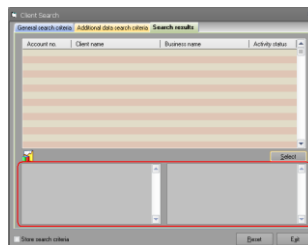
Organisations may require securing everything but the title and business name for certain client types. We have added a security group to client categories allowing sites to specify who has access to view the client details in Client Control Centre. Please note that a user must be able to view the client details in order to edit, delete, read notes, or do anything on that client. Hiding everything for a client is a drastic measure, so please be extremely cautious when setting this group. Software Development Kit has been amended to consider this security group.



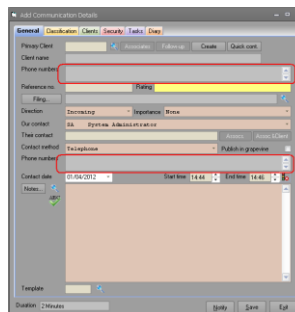
- ✚ We have changed the favourite tab of the Work Centre. The staff and client teledex as well as the client option will now consider the view security group for the client categories. All entities that are secured will be removed from the list.



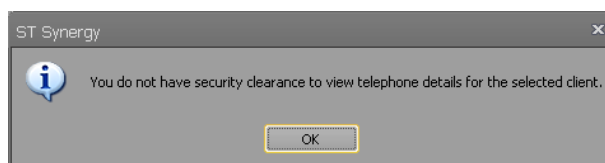
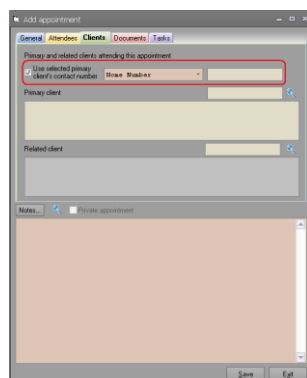
- ✚ Client search form has been modified to consider the view security group from the client categories. The text boxes below the list will not display anything if the user does not have access to view the details.



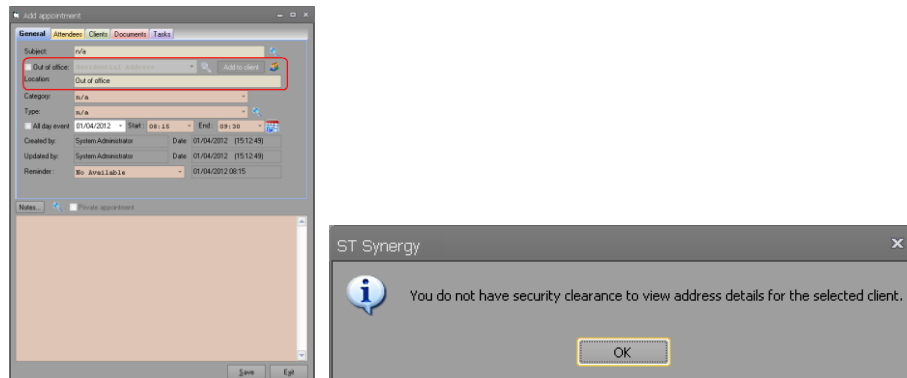
- ✚ The communication from will now only displays the telephone details, if the user has view access to the selected client category, similarly for the associate's phone details.



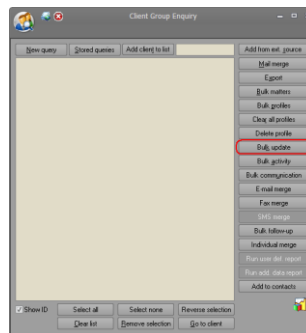
- ✚ The calendar form now checks the client view security group before displaying the telephone details in the clients tab. A message will be displayed if the user does not have security clearance.



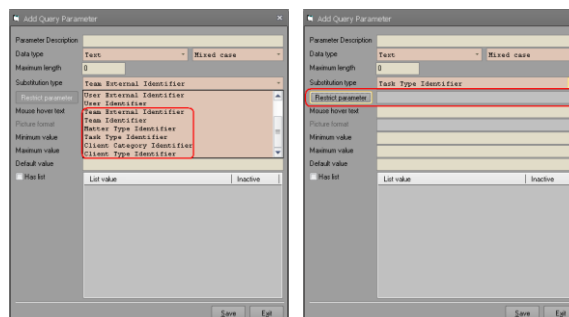
- The calendar form now checks the client view security group before displaying the address details for out of office appointments. A message will be displayed if the user does not have security clearance.



- Bulk update on Client Group Enquiry was ignoring the security groups from client categories. This has been fixed on this version. Synergy will only update the clients that user have update access to. The message also amended to notify the user of the number of clients that user does not have security clearance.



- We have allowed client category, client type, matter type, task type, team external identifiers and team internal identifiers to be defined as query parameters. When defining the task type and client type parameters, a matter type and client category must be selected. This will restrict the client and task types to the selected client category and matter type at run time. Please note that the return value from the client type parameter is the primary key from the ZZTYPDEF table not the ZZCLITYP table.



- The estimated fee and actual fee for matter and task was designed to store the corresponding values for a matter and task. However, given that these fields can be renamed, its purpose could be storing any numeric information required by an organisation. In many cases, the values that need to be stored in these fields could be



negative values. In previous versions Synergy was not allowing negative values to be stored on these fields. In this version, we have allowed matter and task types to carry a setting that specifies the behaviour of these fields when negative values are entered. In previous versions, we added ability to restrict the values for these fields at the matter types. In this version, we have also added the same limits for task types to make it more flexible. The matter and task edit forms have been amended to include validation based on these new settings. Software Development Kit has also been amended to consider these settings.

We have added two new document creation context, client follow-up and task follow-up. These creation contexts restrict the master document to be available only from the follow-up form. Synergy will then snapshot the follow-up fields and will make it available for merging. Please note that when launching or creating a document from the follow-ups form, the details from the form will be merged into the document. However, the actual data stored for the follow-up will be used when the same document is launched from everywhere else. The document button from follow-up form will only list master documents that are defined with the correct follow-up creation context.

List of fields that can be merged are:

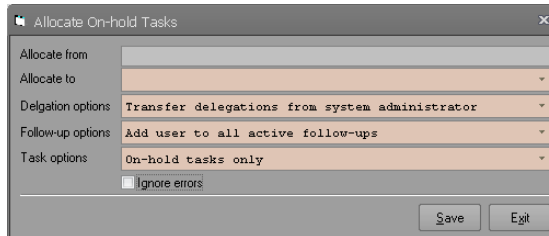
FUREFERID:	Follow-up reference number
FUENDDATE:	Follow-up recurrence end date
FUDUEDATE:	Follow-up due date
FULASTDATE:	Follow-up last actioned date
FUTYPEDESC:	Follow-up type
FUCATDESC:	Follow-up category

- We have included other address to the project with address type clients. Software Development Kit has been amended to store other address for project with address type clients.

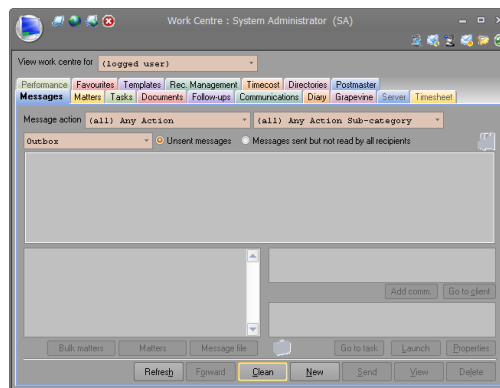
- Synergy displays the subject, appointment type, comments and some other information for appointments. In some cases, the subject line or comments may actually have private information and users may not wish these to be publicly available unless the user has security clearance to view the appointment. From this version, the diary tab will display “Private” as the subject and remove everything from the text box on the bottom left hand side for private appointments if user does not have security clearance.

- When transferring information from one client to another, in some cases, transferring association may create duplicates. We have changed this to avoid creation of duplicate associations. In this version, if there is an exact association matching the client and associate, association types and start and end dates, then the association will be ignored rather than being copied. Please note that remarks will not be copied across in these cases.

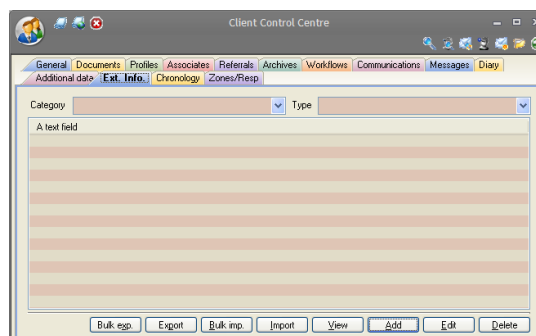
- When allocating active and on-hold delegations and follow-ups to someone else, Synergy was leaving the approver of the task unchanged and was ignoring the Housekeeper setting for changing the task approver when claiming the delegation. We have fixed this and from this version, when delegations are allocated to others, task approvers will change appropriately.



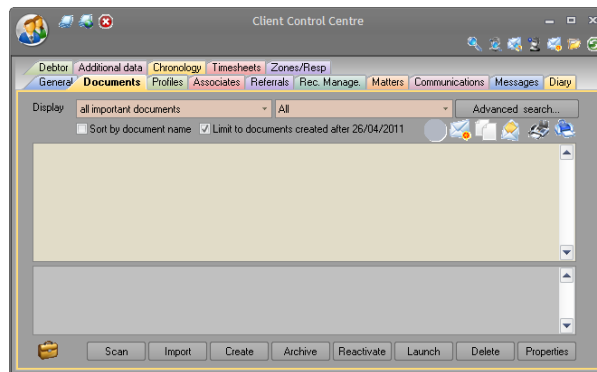
- In Work Centre, users can now delete unsent outbox messages in bulk. If there are no messages ticked, then the highlighted message will be deleted.



- Synergy had allowed organisation to import and display any externally stored data for clients using External Information tab. However, this is the least used feature in the whole System. External information can be viewed as a restricted version of Additional Data. In additional data, there is no limit as to how many fields users can define. However, external information limits this to 20 fields (for each data type). One advantage that External Information has is that the data is already in a single database table and hence developing reports would be much simpler than developing reports additional data reports. We have allowed completed maintenance of external information as well as import and export functionality from the Client Control Centre. The plan is to provide identical features as additional data to external information fields. It is also planed to allow external information to be linked to matters and be captured as part of workflow decision in case organisations prefer external information as opposed to additional data.



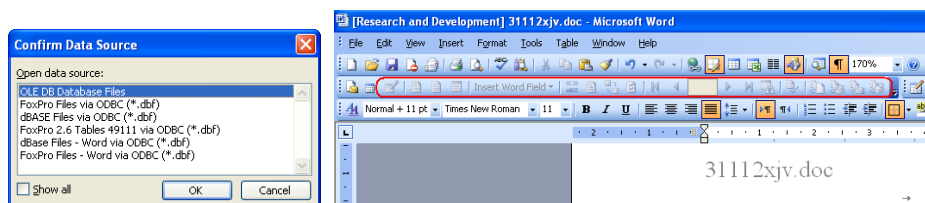
- Added ability to filter client important documents by importance levels in the documents tab of the Client Control Centre.



- Fixed a bug in Software Development Kit. The document template identifier was not working properly. Also added a new property for developers that allow them to pass the external identifier of the template rather than the internal identifier.
- In the messages tab of the Work Centre, when the inbox option is selected, Synergy excludes messages that were sent to filing clerk from the list. However, when clicking on the inbox on the information panel, these messages were being displayed in the message desktop. From this version, these messages will be filtered out similar to the inbox option.

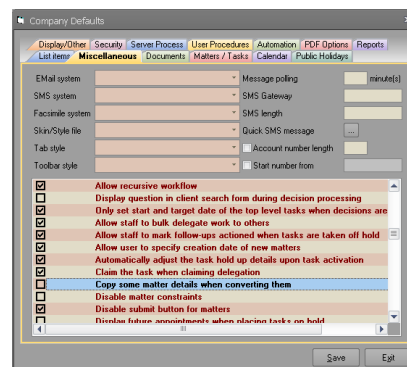


- When loading active Microsoft Word document containing merge fields and amending them, if the users closed and saved the document, everything was working fine. However, when a user attempted to save document without closing it, a confirm data source dialog may be displayed. This was due to the fact that the document was losing its connection to the merge table. Even selecting a data source was not enabling the merge toolbar. This was due to a bug in SynWord8.dot Synergy Word Template file that was returning the wrong Data Source Name. This bug is fixed in this version.

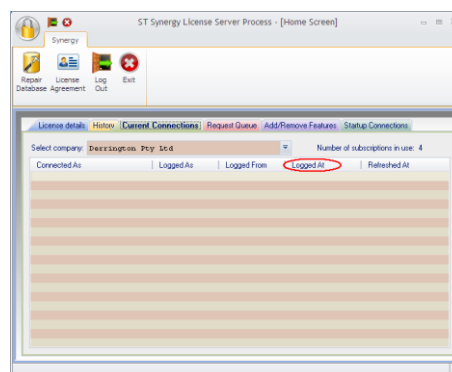


### *Modification as at release 10.00.01b*

- Due to changes that were done to preserve the email format in V10.00.01a, when sending emails from Synergy, on some outlook versions, the recipients of the emails were getting a plain text message with a winmail.dat or mail.dat attachment. This has been fixed on this version.
- The creators of communication were not able to delete their own communication when there were security groups or users attached to the communication and the creator was not part of any security group. We have allowed this to occur in this version.
- In Matter Control Centre, when converting a matter to another matter, nothing from the old matter itself was being copied to the converted matter. In some cases, things like reference number and notes could be useful to keep. Also when the old matter gets deleted, there is no history kept in the system. In this version, we have introduced a new setting in the house keeping called **“Copy some matter details when converting them”**. When this setting is turned on, the reference number and matter notes will be copied from the old matter to the converted matter. We have also added structured notes to the data that gets transferred to the converted matter. Please note that these structured notes will be attached to the first task of the converted matter.

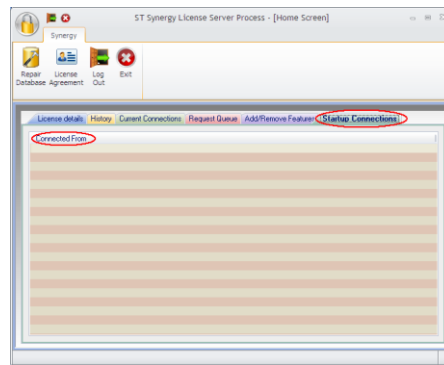


- The transfer button from Client Control Centre was not preserving document addressees. This is fixed on this version.
- In the current connection tab of the license server, we have decided to list all of the active sessions with the login date and time for that session. This could assist administrators to work out whether a session has been left running for days or it is an active session started on the day which could be helpful in many occasions.



- We have added a new tab to the license server application that will display the current connections to the start up database. It will be handy to know this in cases where administrators would like to restart a server. Just restarting the server without

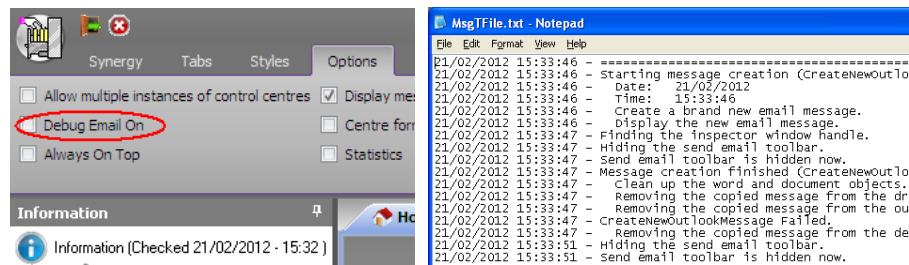
properly disconnecting and shutting down Synergy applications may cause corruption of the start up database.



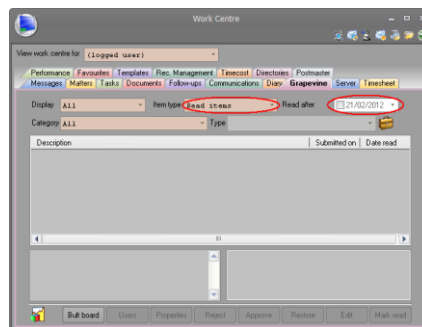
- ⊕ We have changed all our server processes so that they do not keep an open connection to the start up database. This will not affect the normal processing as the connection gets established as needed and removed when no longer required.

### **Modification as at release 10.00.01a**

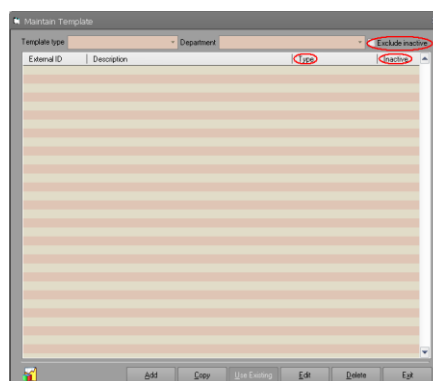
- ✚ Users with thousands of items in their Outlook deleted items folder were experiencing considerable delays in creating and sending emails when hosting Outlook emails and preserving the message format. Synergy was attempting to delete temporary emails that were being created from this folder which was the main reason for this delay. This process is now optimised.
- ✚ We have added the date and time to the log file created using the debug mode option for tracking Outlook messages.



- ✚ When restricting the grapevine read items using the date picker, the approval date of the grapevine item was being used for filtering rather than the date the user had read the grapevine item. This is fixed on this release.

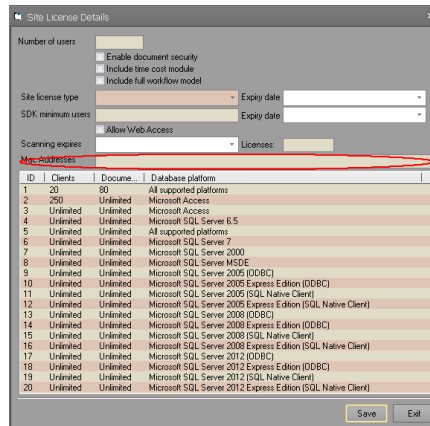


- ✚ We are displaying the template type and inactive flag in the template maintenance form. We have also added a check box to filter out inactive entries should administrators require. Inactive entries are also displayed with bold fonts in the list.

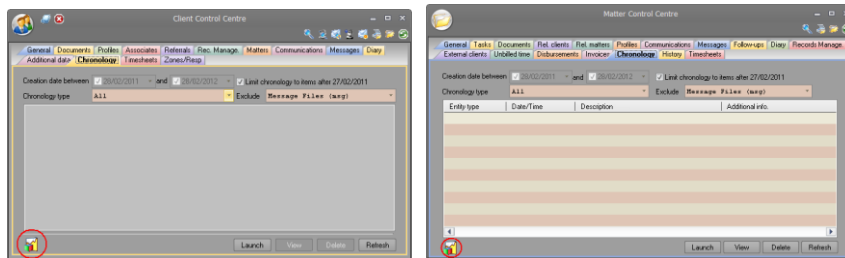


- ✚ In the previous versions, only task approvals were being logged when the “Keep history of matter and task approval” housekeeper setting was turned on. From this version, un-approval of the tasks will also be logged the same way.
- ✚ When Synergy is decoupled from license server, licensing changes should be done from the Synergy application using the license button from the “Add/Edit company”

form. However, there was a bug that caused the entered Mac Addresses to be ignored and not saved. This bug is fixed on this version.



⊕ Fixed a bug in the chronology report.



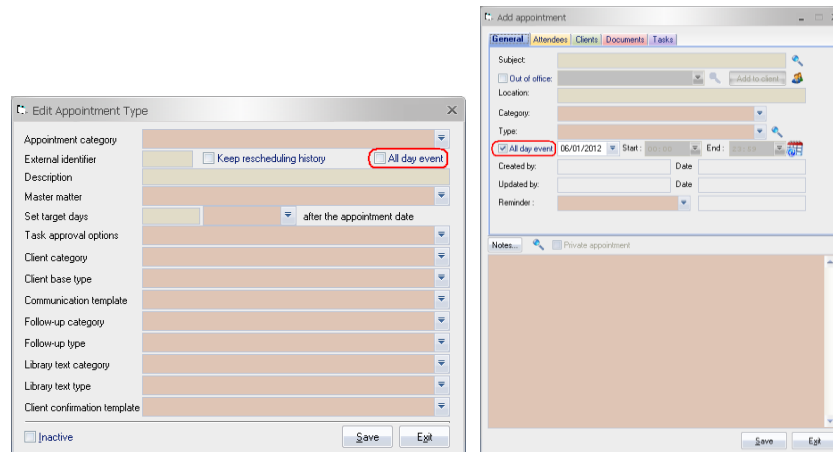
⊕ When sending or importing messages, the direction of the MSG file was always set to incoming. We have changed this so that it matches up with the message when it is imported or sent. Please note that after importing the message, changes to this will not be applied to the MSG file.

⊕ When importing emails, Synergy will attempt at linking clients with matching email address to the imported email. In cases where the email address was blank, the code was attaching clients that did not have an email address in Synergy. We have amended the code to ignore the client linking when the sender's email address was blank.

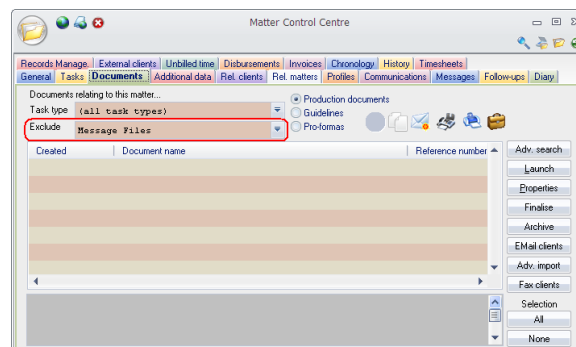


## Modification as at release 10.00.01

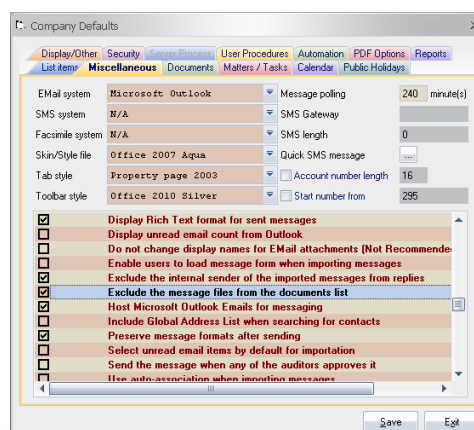
- ✚ We have allowed appointment types to be marked as all day events. When appointment types are marked as all day events, selecting them in the calendar form will automatically check the all day event check box.



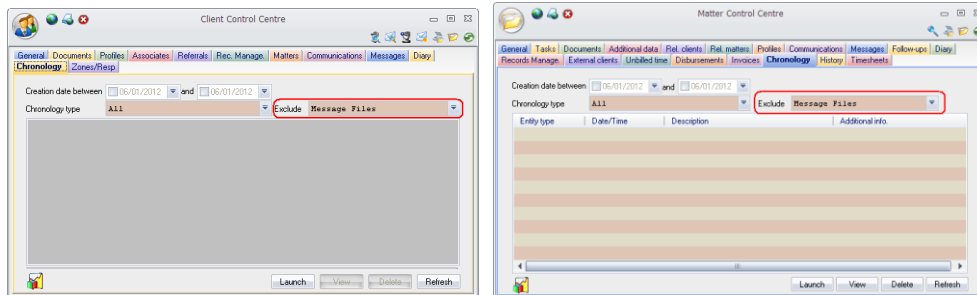
- ✚ We have added an application type filter on the document tab of the Matter Control Centre allowing selected types of production documents to be filtered out of the list. As an example, this could help to filter out unwanted message files from the list because the messages can be seen in the messages tab.



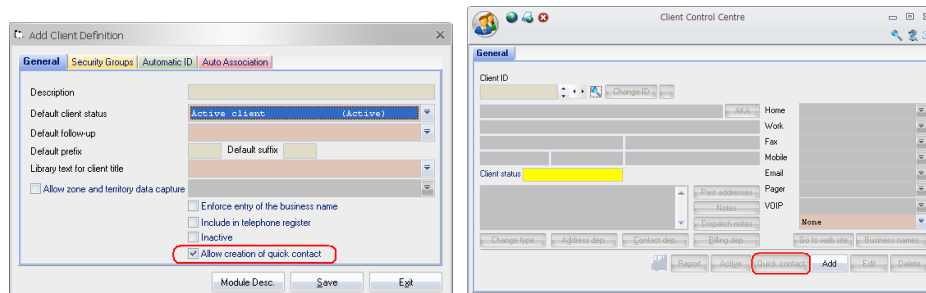
Please note that the application type filter is only considered for production types documents. It will be ignored for pro-forma and guideline document. We have also provided a setting in the housekeeping to default this drop down to message file application type.



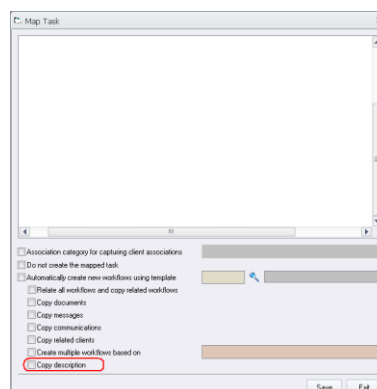
- The chronology tab of the Client Control Centre, Matter Control Centre and Task edit form is also amended to include the application type drop down for excluding documents. Please note that the application type filter is only applicable when all or documents chronology type is selected. It will be ignore for all other of chronology types. This drop down will also be defaulted to the message files if the above housekeeper setting is turned on.



- Synergy provides a quick contact button in the Client Control Centre. This button provides the ability to quickly create a contact for a company. However, we have observed that some users use this button to create a contact for another contact which does not make sense. In this version, we have allowed administrators to specify what types of clients should have quick contact creation facility.



- As part making a workflow decision, another workflow can be created. In some cases, users may want to set the description of the newly created workflow the same as the description of the workflow that created it. We have added a new option in the task mapping form that allows users to do this.



- Given that the estimated and actual fee for matters can be renamed, sites may rename these fields and use it to store any numeric data that they wish to. In these instances, it may be useful to specify an indicative range for these fields. This could be used to warn users when the entered value falls outside the indicated range. For example, a matter that has been configured for sales process, one may rename the estimated fee

to quantity and actual fee as price. Confusing these two could be quite catastrophic especially if the other matters get created based on the value stored in the quantity field. We have added 4 additional fields to the matter type allowing these limits to be set. Please note that this is only used for warning the users through user interface and is not used for any other purpose.

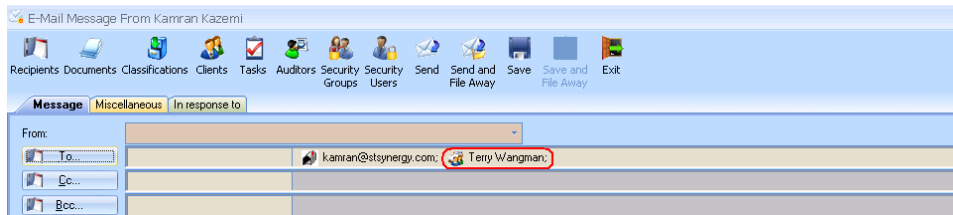
We have also added a new flag that allows system to set the delegated user to be the logged user for a matter type. Again, this is purely used to bypass the delegation question when a task is approved and the subsequent tasks require delegation.

✚ In previous versions, when a user imports an email into Synergy, Synergy will add the email address of the sender to the recipient list as well as the person that imported the email message. In some cases (when a person is importing his own sent emails from Outlook), these two entities could be the same person as far as Synergy is concerned.

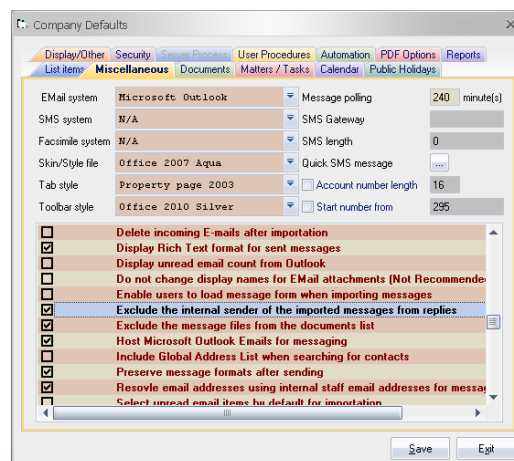
When replying to these emails, Synergy was adding both as recipients of the reply email. We have amended Synergy so that only one entry is added when the email address of the person that imported the message is the same as the email address of the sender.



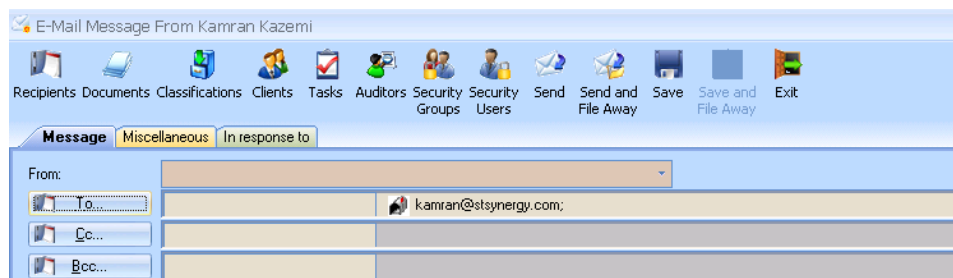
In some cases, users import emails and send them to their filing clerks for further processing. In these cases, the filing clerk may actually be responsible for replying to the original sender of the email. In previous versions, Synergy was including the person that imported the email to the recipient list. It may not be desirable for the person that imported the email to receive a message when the filing clerks replies to the message. In the following image, Terry has imported a message sent from Kamran and has sent it to his filing clerk for workflow creation. After the workflow creation and attaching the message to the task, the filing clerk has replied to the imported message. The reply email has the sender as well as the original person that imported the email message into Synergy.



We have introduced a setting that allows administrators to stop this behaviour. With this setting turned on, Synergy will exclude the person that imported the email message from the recipient list of the reply message. Please note that this setting will only be considered for imported emails from Outlook. Sending internal Synergy messages will not be affected by this setting.

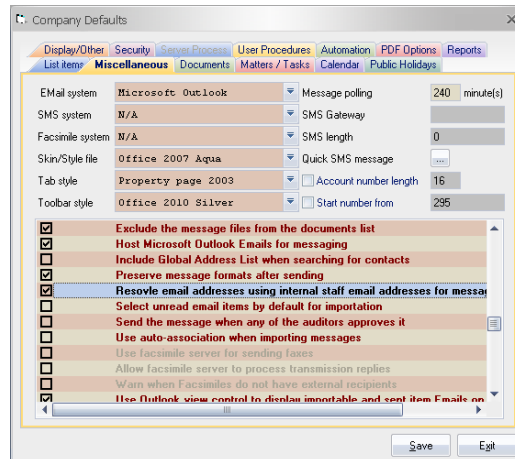


As you can see from the following image, Terry has been removed from the recipient list with this setting turned on.



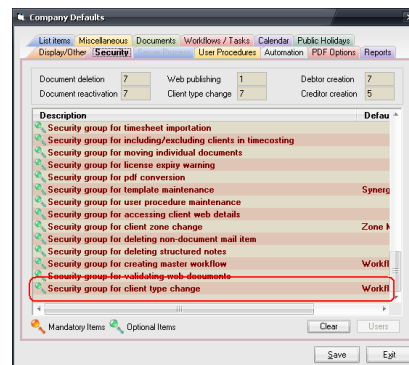
In many cases, recipients of the imported messages could be internal staff known to Synergy. In previous versions, Synergy was simply storing the email addresses of all recipients as plain email addresses for these imported messages. We have introduced

a new setting that allows administrators to force Synergy to resolve these email address using the internal staff records.

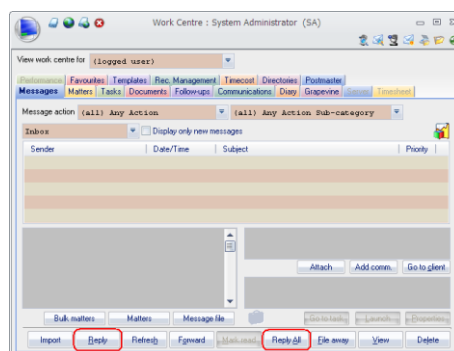


With this setting turned on, the email address of each recipient will be checked and if it matches with exactly one active staff member, then Synergy will link the message to the internal staff record rather than linking the message to a plain email address. Once the message is linked to the staff member, Synergy will automatically file away the imported message for the staff member so that his/her messages tab in the Work Centre does not get cluttered. To use this setting properly, you have to ensure that user's do not share email addresses. If you have an environment where users share email addresses in Synergy, this will not work for those users.

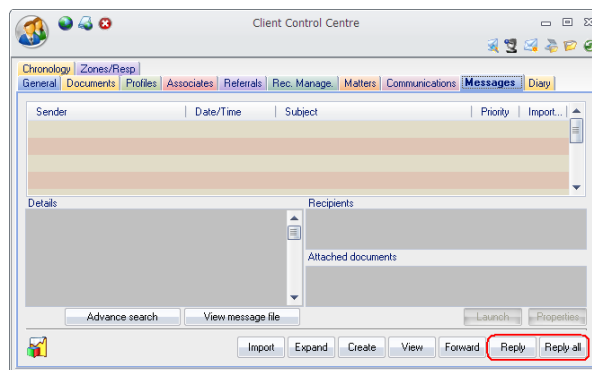
Added a security group that will allow controlling who can change client type.



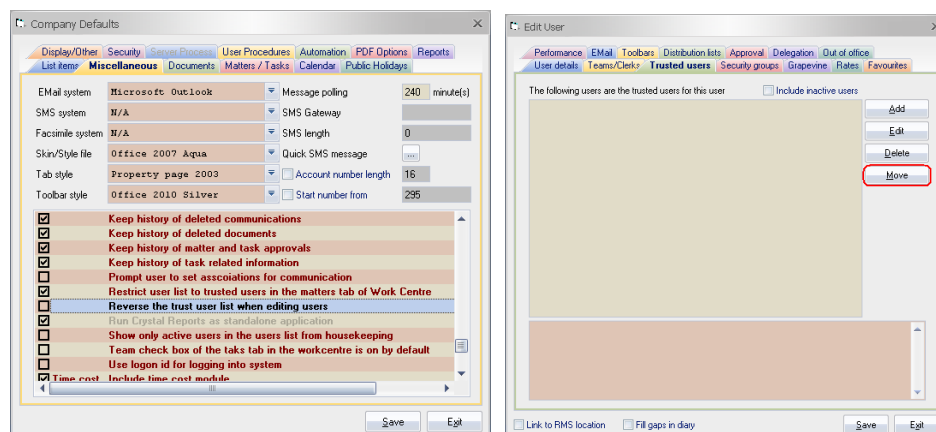
We have added a Reply all button to the messages tab of the Work Centre. Since the old reply button was behaving as a reply all, we have placed the reply all button in the same location.



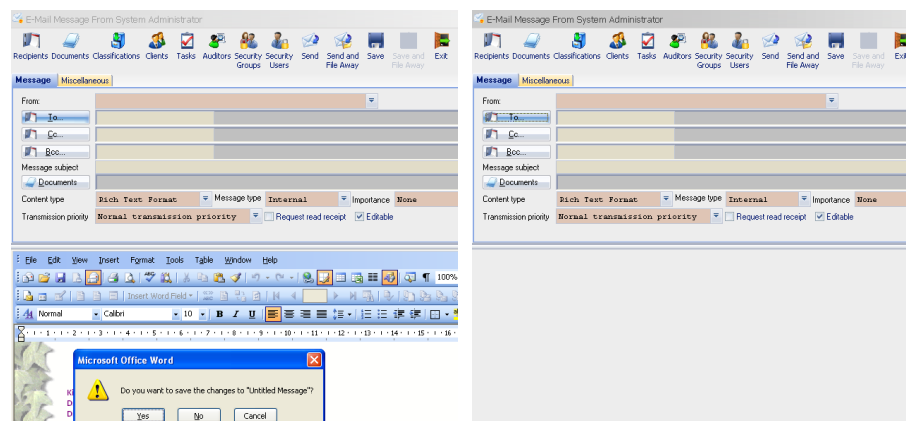
- ✚ We have added a reply all button to the messages tab of the Client Control Centre.



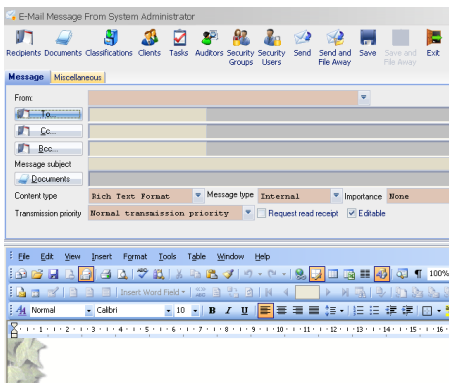
- ✚ We have added a new setting that allows administrators to reverse the trusted user list when editing a user profile. With this option turned on, the list will contain the trusted users of the user being edited. We have also added a new button called “Move” that will be visible when this option is turned on. This button allows the administrator to select a user and transfer the multiple trusted users from the current user to the newly selected user. This option is in the “Other” section of the list box in the miscellaneous tab of the company defaults. This should allow easy maintenance of trusted users when staff leave or change roles in an organisation.



- ✚ In previous versions of Synergy, when hosting Outlook emails in message edit form, pressing escape key while the focus was on Outlook email was closing the outlook email window and leaving Synergy’s email form without a body.



In this release we have forced Synergy to ignore the escape keys when the focus is on message body so that it will always stay open as long as the message form is open.



- Increased the Email address fields to 250 characters. The following tables were affected:

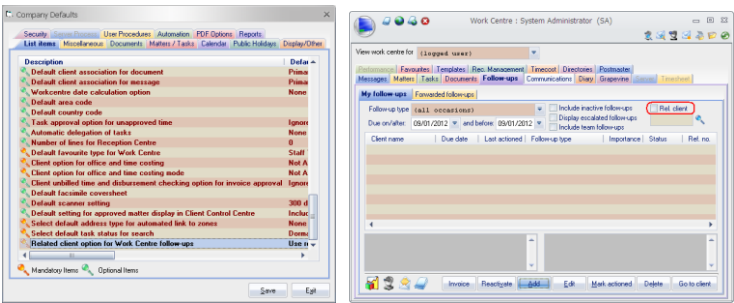
ZZCLIENT (EMailNo), ZZSYNCLI (EMailNo), ZZCLIFRZ (EMailNo), ZZMESSAG (EMailAddr), ZZANNJCN (EMailNo) ZZANNCCN (EMailNo), ZZEXTCLI (EMailNo) and ZZUSER (Email)

If you are using stored queries that have ZZCLIENT.\* as select clause, we recommend reviewing these queries and select columns that your query actually require.

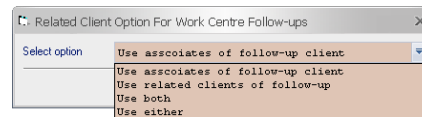
- Added ability to attach clients as related clients to follow-ups. Also, when adding task related follow-ups, the matter auto-association categories will be used to link the required associates to the follow-up. This will be done silently if the related client list is empty. If the list contains related clients, the user has to confirm before the list is replaced.



Given that follow-ups can now have their own related clients, we have added a switch to the list items tab of the company defaults to control the behaviour of related client check box in the follow-up tab of the Work Centre.

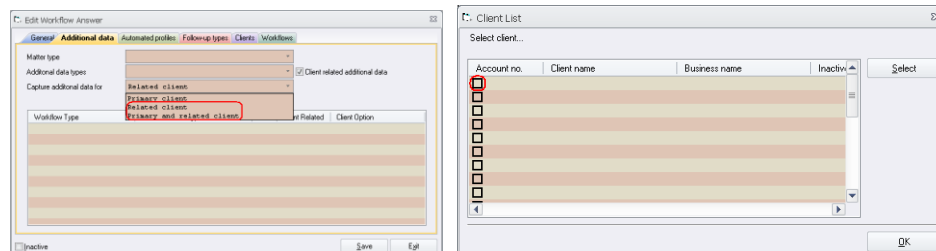


We have provided 4 options:

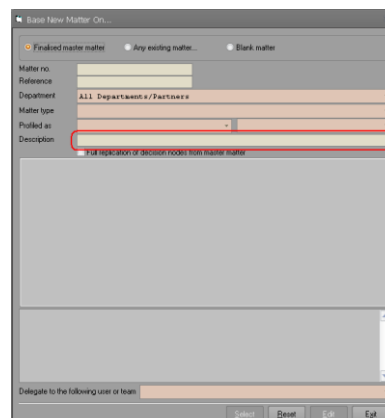


- 1) Use associates of the follow-up client: This is the default setting and preserves the behaviour of Synergy with the previous versions. Using this option will use the associates of the primary client of the follow-up for filtering.
- 2) Use related clients of follow-up: Using this option will use the newly introduced related clients attached to the follow-up for filtering.
- 3) Use both: When this option is turned on, a follow-up will only be displayed if the entered client is an associate of the primary client as well as the related client of the follow-up.
- 4) Use either: When this option is turned on, a follow-up will be displayed if the entered client is either an associate of the primary client or the related client of the follow-up.

When decision answers were configured to capture additional data for related clients, Synergy was only allowing a single related client to be used for additional data capture. In many cases, users may want to capture the additional data for a number of related clients. In this version, we have added check boxes to the list of related clients, allowing users to select multiple related clients. Please note that if you do not tick a record, the highlighted record will be selected by default for additional data capture.

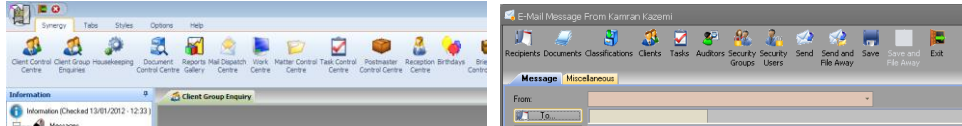


The description filter on the master matter selection form was only using matter description for comparison. We have added the matter notes and matter production notes to this comparison. Entering anything in the description field will return any master matter that have the entered string anywhere in the description or the matter note or the matter production notes.

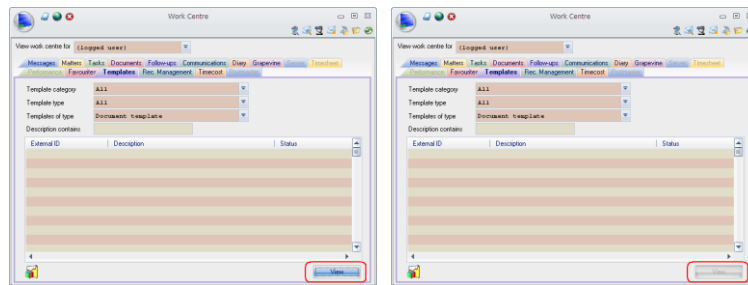




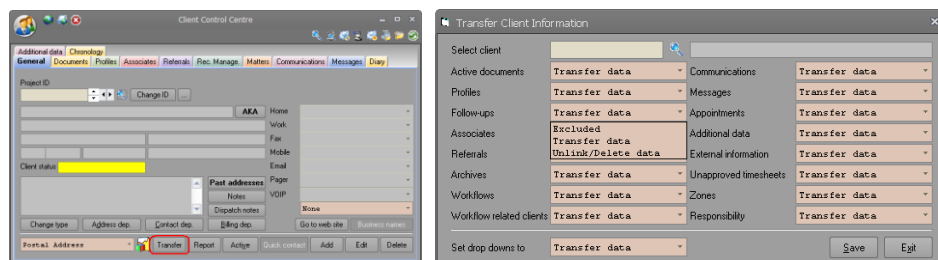
- When changing the toolbar styles, the forms that were displaying toolbars (e.g. message edit form, mail merge form etc) were not using the selected toolbar style. As you can see in the following images, Synergy desktop is using office 2007 scenic toolbar style while the message form is set to office 2010 black toolbar style. This has been fixed on this release of Synergy.



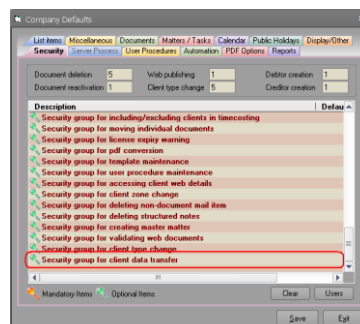
- There was a bug that allowed the templates to be viewed and modified from the templates tab of the Work Centre. This is now secured as it should have been using the templates maintenance security group.



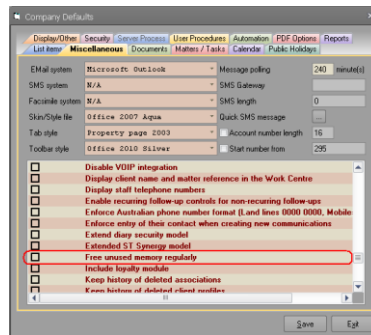
- Added a transfer button to the Client Control Centre. When used, a form will allow user to specify what data needs to be transferred. User can also elect to delete some information. Please note that transferring information from one client to another client may or may not be possible depending on the current configuration of the system. Validation will be done before any data is transferred. Please note that when approved time and disbursement entries as well as invoices will never be touched through this process.



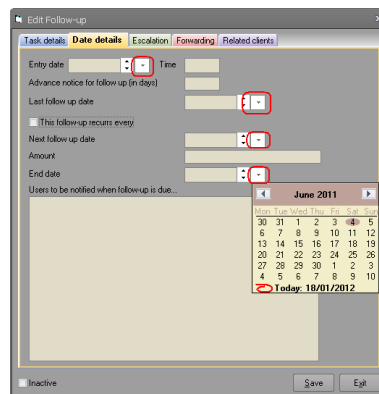
- Given the critical nature of transferring information from one client to another client, not everybody should be allowed to do this. We have added a security to control who is allowed to do this process.



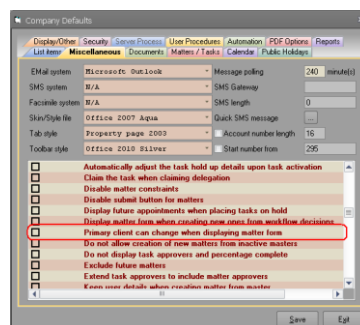
- We have added an option to the housekeeping that allows Synergy to attempt at reducing the process memory used by the application. Memory management is only done by the OS when system is running low on memory. We recommend leaving the memory management to the OS but if you need Synergy to reduce its footprint and return its unused memory back to the OS, turn this option on. With this option on, every 15 minutes, Synergy will try to return the unused memory back to the OS.



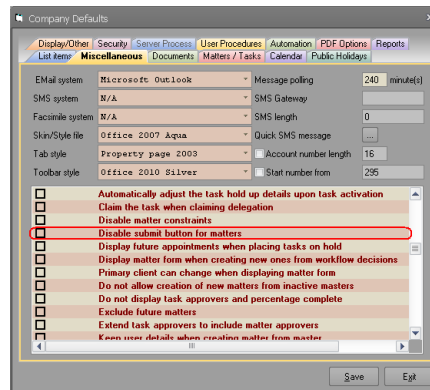
- Follow-up maintenance form now has date pickers that users can use for selecting dates. Those users that cannot be bothered typing the date, can now use the date picker to set various dates.



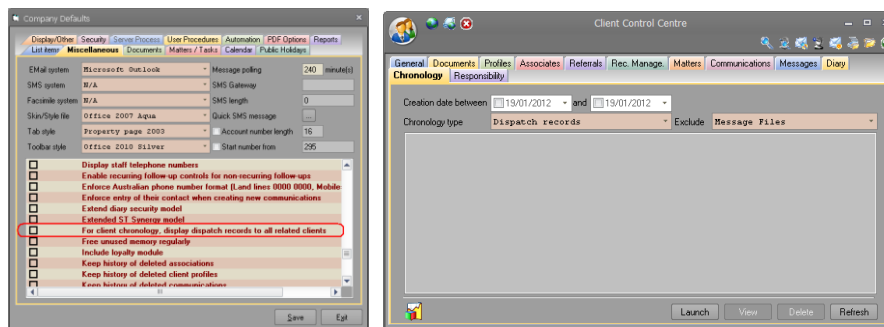
- Synergy allows new workflows to be created from a decision. When creating workflow, the system can show the workflow edit form if the housekeeping setting is turned on for this. In some cases, when the workflow edit form is displayed, the users change the primary client of the workflow and hope that the new workflow will be created for the selected client. This is not the case. Workflows created from decisions will always be linked to the primary client of the workflow that they are created from. However, there may be cases where it could be required to change the primary client for new matters. We have added a new setting that allows users to change the primary client of the workflow when created in these cases.



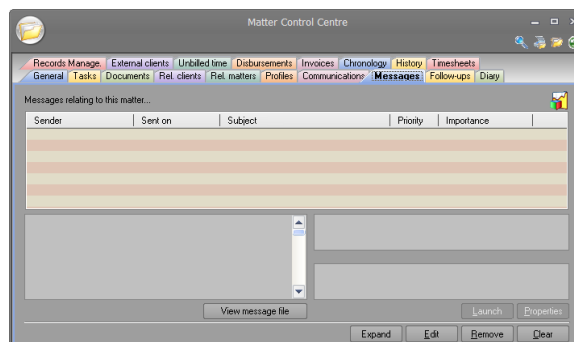
- Synergy allows workflow to be submitted for review. This can be done by using the submit button that can be found in the Matters tab of the Work Centre, the Matters tab of the Client Control Centre and the General tab of the Matter Control Centre. However, we believe that processing through the workflow normally should and would change the status of the workflow to under review when required. We have added an option to the housekeeping that allows Synergy to disable these buttons so that people do not click them by mistake.



- In the chronology tab of the Client Control Centre, incorrect records were being displayed for dispatched records. Synergy was simply displaying the dispatch records of any document where the client was the primary client of the document regardless of whether the dispatch record was for the client or anyone else. In this version, we are only displaying the documents that have been dispatched to the client. Some sites may want the chronology to display the dispatched records for client and any of his/her associates. We have also added a new setting to the housekeeping that allows this to happen. When this switch is turned on, the document will be displayed if it is dispatch to the client or any of the associates of the client.

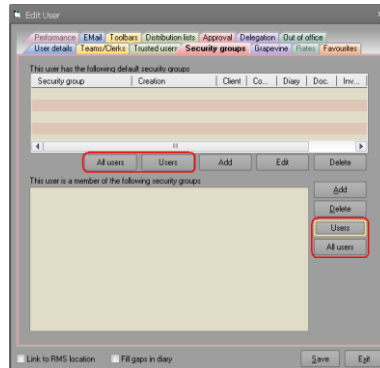


- There was a bug in displaying messages in the Matter Control Centre. Synergy was displaying unsent messages. This is corrected in this version.

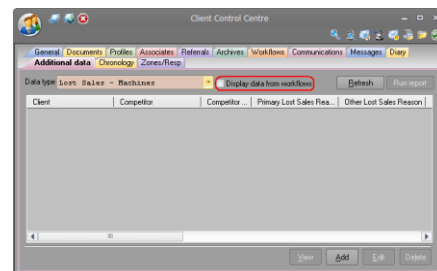
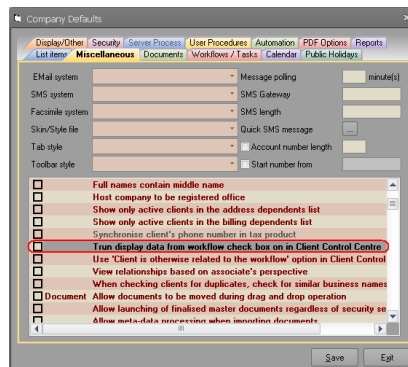




Sometimes it would be useful to get list of users for security groups when setting a user profile with security groups. This will assist to ensure that the default security groups are set properly. We have added four buttons to the security tab of the user edit form. The “Users” button will display the users from the selected security groups. If there are no security group is selected, then users for the highlighted security group will be displayed. “All users” will simply display the users for all of the security groups in the list.

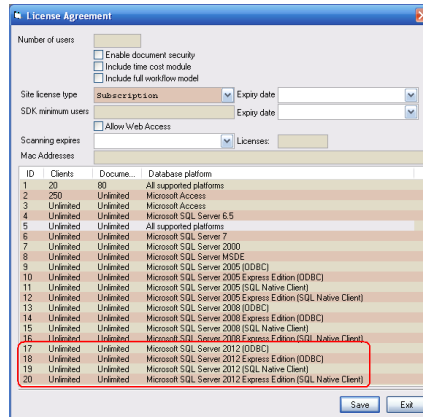


Added a housekeeper setting that controls the check box that allows display of matter related additional data in the Client Control Centre.

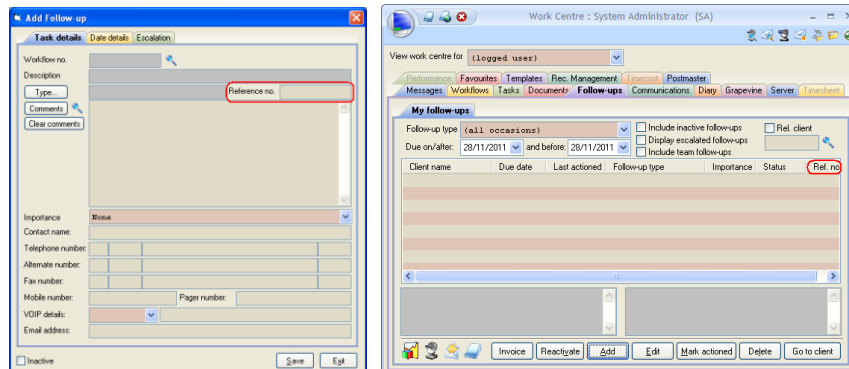


## Modification as at release 10.00.00

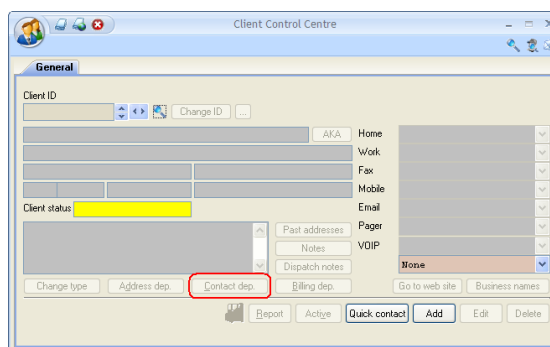
- Synergy is now SQL Server 2012 (code name Denali) compliant. We have made all the necessary so that the new database platforms could be used by all our customers.



- In some cases, sites may need to store a reference number for follow-ups. As an example, in a sales based environment, follow-ups could be used for tracking warranties. It is possible that warranties have different code depending on the type of warranty and its length. We have added a reference number to follow-ups and have displayed it in some of the follow-up lists.

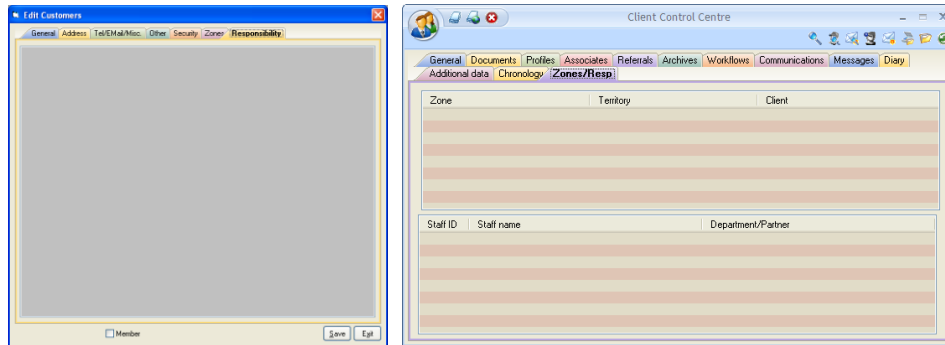


- In some cases, clients are linked to other clients as contact source. In Client Control Centre, it was easy to navigate from billing debtor to billing dependents but was reasonably difficult to navigate between the contact source and contact dependents. We have added a new button called "Contact dep." To provide easy navigation between these clients.

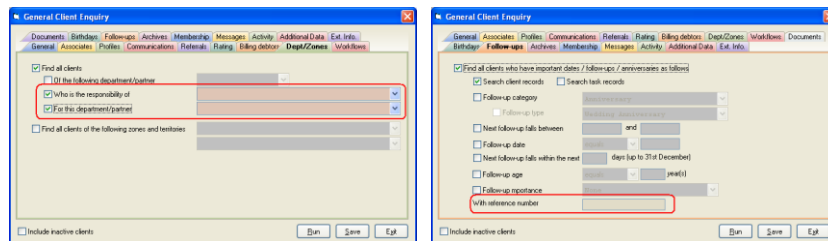




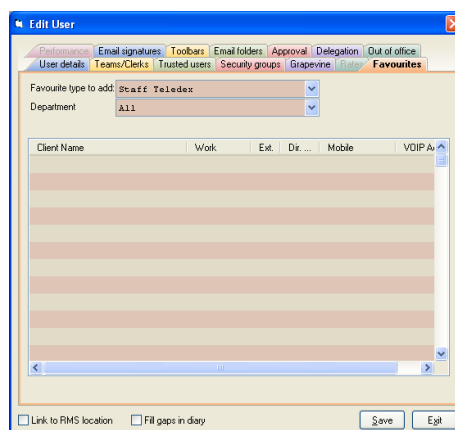
In some cases, multiple people from multiple departments may be responsible for a client. Synergy was only allowing one person to take the responsibility for a client in the previous versions. In this version, we have allowed multiple people from various departments to be made responsible for a client. Please note that responsible person for client remains as before. We have merely provided extra facility to indicate who else could be looking after a client. When adding/editing clients, a new responsibility tab allows users to specify various users and departments. Once the users and departments are linked to the client, they can be viewed from the Zone



Client Group Enquiry form has been amended to include the new person responsible and the reference number for the follow-ups.

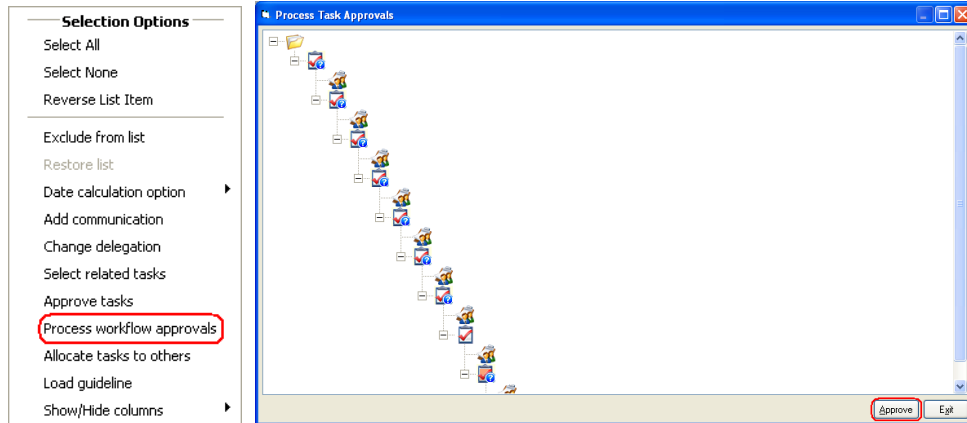


We have allowed favourites to be stored for teams and then displayed in the Work Centre for all members of the team. Please note that the team based favourites can only be deleted from the user edit from in the housekeeping.

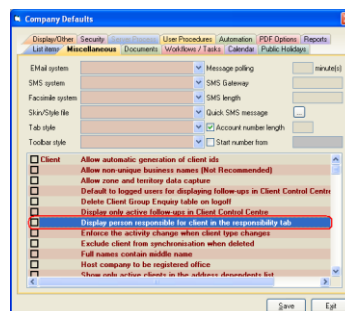


In the task tab of the Work Centre, users can approve tasks by selecting them from the list and the approving them using the menu option. This is fine as long as a single task within that workflow needs to be approved. In many cases, it is possible that the user may want to process the workflow and approve more than one task. This was quite difficult from the task tab since that tab was simply designed for a single task approval. We have added a new menu option to the "Process workflow approvals" to

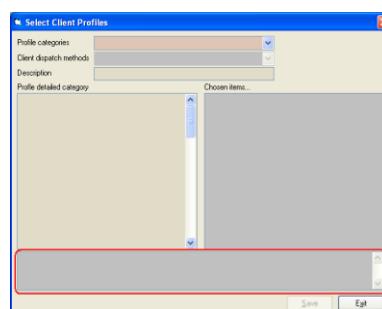
the popup menu from that gets displayed from the task tab. Users can select multiple entries from the list and click this menu option. By doing this, the selected task will be approved and then a new form displays the entire task tree for the workflow. User can then continue approving tasks until they have finished with that workflow. Once that workflow is completed, they can click the exit button and proceed working on the next workflow. Please note that the form will automatically close when the workflow is approved



- ✚ We have added a setting to the housekeeping form that allows all primary person responsible for the client to be displayed in the responsibility tab of Client Control Centre.



- ✚ We have fixed the issues with the change delegation option from the task tab of the Work Centre. It was processing alternate rows and now it should process all of the selected rows.
- ✚ The reply message was not displaying a separator line between the message and the original message when using RTF format. This is fixed now.
- ✚ We are now displaying the extended description for the profiles when adding them to the client.





Added spell checker button to the communication form. This will use the spell checking from Microsoft Word. Consequently, it will only work if Microsoft Word is installed on the machine. Also increased the height of the communication form so that more comments can be viewed.

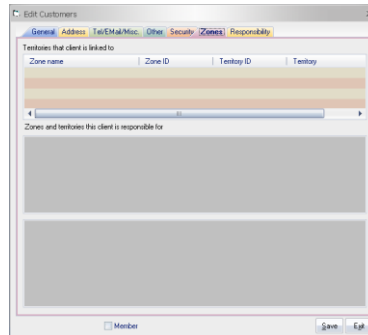


When adding association categories to a Partner/Department, Synergy uses these association categories to limit the association categories in the drop downs. In some cases, one may want to restrict the association categories when adding association but display an unrestricted view of associations in the Client Control Centre.

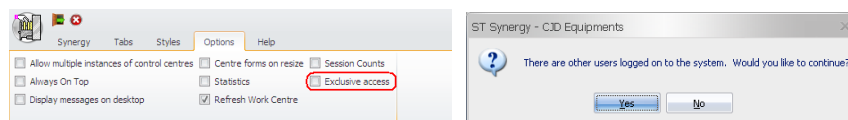
We have added a new setting to the housekeeping form to allow sites to overwrite this behaviour for the associates tab of the Client Control Centre.



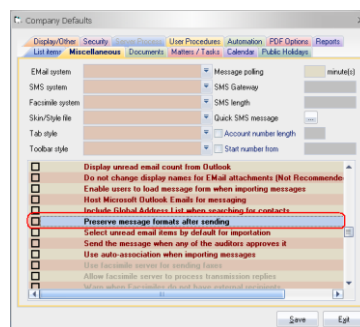
- When changing a post code that was being used for automated zoning, Synergy was not replacing the old zone with the new zone. In this version, we are removing the old zone and replacing it with the zone based on the newly entered post code. In addition to that, in cases where a site has multiple zoning systems, all the relevant zones are added/replaced appropriately.



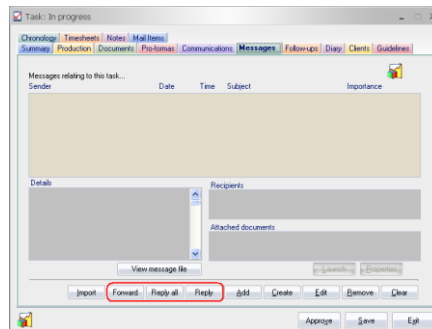
- In previous versions, administrators could only set exclusive mode access from the login form. We have added a checkbox to the options tab of the Synergy toolbar that will allow administrators to set exclusive access without having to log out and back in. We recommend changing this setting when the Synergy home screen is loaded. Administrator will have to confirm when the exclusive access mode is turned on to avoid unintended mistakes.



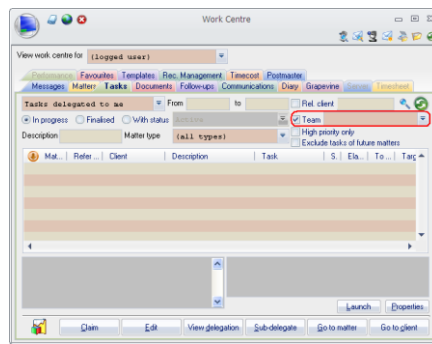
- In previous versions, replying or forwarding to externally imported emails was not preserving the original format of the email. We have changed Synergy to keep the format of the original email when replying or forwarding these emails. For this to work, we have added a new setting that allows sites to specify that they would like to preserve the formatting of the imported or sent messages. When this setting is turned on, Synergy will create a new folder called “Synergy Sent Messages” under the default Outlook inbox. When messages are sent, Synergy will save the message into MSG file before sending the message. It then will specify this new folder as the Sent Items folder for the message. Once the message is sent, Synergy will look for then sent message in this new folder. Once located, it will save it again with the proper format and then will move the sent message to the Outlook sent items folder. Please note that Synergy will only check the new folder for a maximum of 2 minutes. If it takes more than 2 minutes for the message to appear in this new folder, Synergy will return and keep the originally saved MSG file and the Email will be left in the new Synergy Sent Messages folder.



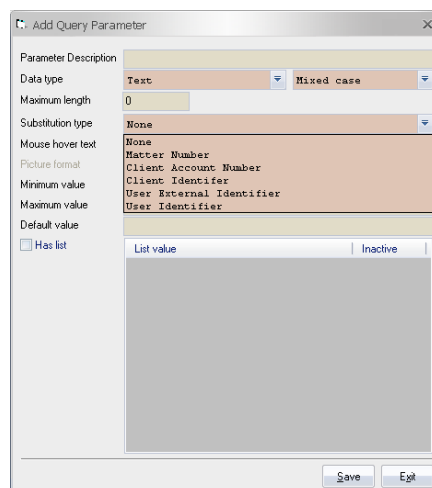
- The reply button in the task edit form was a “Reply all” button. We have added a reply and forward button to this form and renamed the existing reply button to reply all.



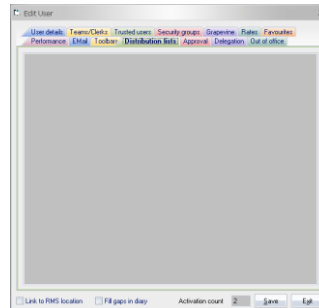
- We have added a team drop down in the task tab of the Work Centre allowing users to further filter the list for a specific team.



- In the previous versions, user could use internal and external user identifiers for report queries. However, to display a list of users, each user had to be added to the list. In this version, Synergy will look at the parameter definition. If there is no list defined for the internal and external user identifiers, then it will automatically display the active users from the user table. If the parameter contains a list, then that list will be displayed. Please note that in this version, the last 5 characters of the selected list entry will be returned as the parameter value. If the parameter is a numeric value, then the last 5 characters will be converted to a numeric value and the numeric value will be return. In case of external identifiers, the last 5 characters will be trimmed and padded with spaces on the right side and then returned.

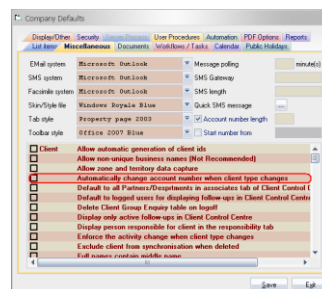


- We have combined the Email signature and Email folder tabs in the user edit form into one tab called “Email”. We have also added a new tab called “Distribution lists”. This tab allows administrators to create personal distribution list for that user. This feature was only available from the email edit form in the previous versions. We have provided this facility so that administrators can set up personal distribution lists from the housekeeping when setting users.

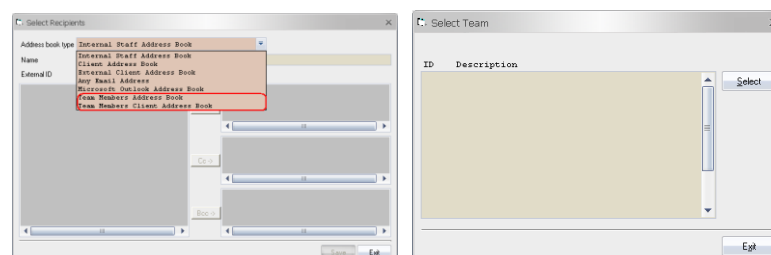


We have added a new menu item for global distribution lists in the message form. This option will display all of the distribution lists attached to the system administrator. This allows sites to create standard global distribution lists for every one. In the future release, we will allow the distribution lists to be defined as private or public for System Administrator.

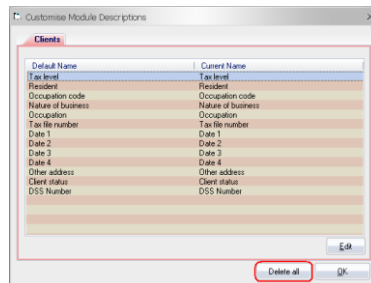
- Sometimes when client type changes, users may want to change the client account number as well, specially when the account number have prefix and suffix characters. We have added an option that will allow the client account number change form to be displayed when the client type is changed.



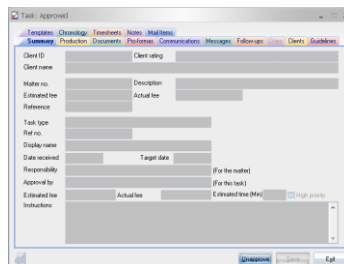
- When sending emails, sometimes users may want to send it to members of a team individually rather than the team itself. In some occasions, users may want to send these emails so that the users will receive them in their Outlook rather than Synergy in case they are out of office or are not logged on to Synergy. We have added two new options to the select recipient form. The “Team Member Address Book” allows users to add internal user records of team members to the list. “Team Member Client Address Book” allows users to add the client records of the internal users to the list. When searching using the search button, a list of active teams will be displayed allowing users to select a specific team.



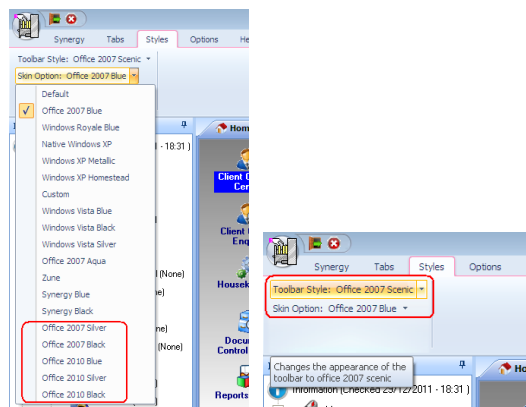
- Added a “Delete all” button to the module descriptions form. This will allow users to delete all of the entries at a client, matter and task type level. Please note that when the module descriptions are deleted from lower levels (task type and client base types) they default to the values at the higher level (client type and matter type or housekeeping). It is possible the displayed values do not change even after deleting the entries. In this case, it simply means that the default value at a higher level is set to the same value as it was set at the lower level.



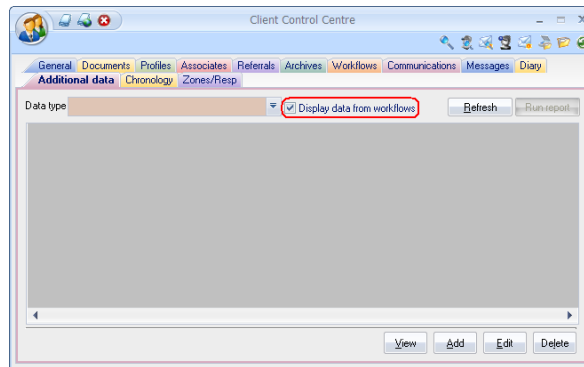
- In previous versions, Synergy was validating the task details when approving and unapproving a task. This was OK as long as the system setting remain identical between the two process. However, system configuration can change and could cause problems when unapproving a task. For example, the system may not enforce the entry of target task date when a task is being approved. Because of this, the user may not have entered a target date for the task. However, after the task has been approved, if the entry of target date is enforced, users could not unapproved the task because the validation will insist on entry of target date. In this version, we have eliminated the task validation during the unapproval process. This should allow users to unapprove a task even with system configuration changes.



- Added Office 2010 (black, blue, silver) and Office 2007 (black, silver) application skins. Also changed the toolbar and skin radio button to a drop down due to the number of options being too many. The drop down will display the currently active option.



- Additional data can be attached to workflow as well as client. In some cases, it would be ideal if one can view the workflow related additional data for a client in the additional data tab of the Client Control Centre. The only option that was available in the previous version of Synergy was developing a report. In this version, we have added a check box to the additional data tab of the Client Control Centre allowing users to view the workflow related additional data for all workflows of a client. Please note that the workflow related additional data cannot be updated or deleted from the additional data tab of the Client Control Centre.



- Fix a bug in the new Email client form (with RTF emails). When there was an error in message creation, it was not processing the deletion of the message correctly. This is fixed on this release.
- When users were creating messages and exit out of the message form, Synergy was attempting to delete the newly created message silently from the system. However, in some cases (e.g. where the email was linked to a task) validation process was preventing the deletion of the email. We have fixed this on this release by bypassing validation all together.
- Editing a message from the list in the messages tab of the Client Control Centre was not preserving the list icon. The list should contain the sent messages for the client. However, when users were creating a message and saving it (without sending), Synergy was adding the message to the list. Of course refreshing would have fixed this. We have fixed both of these inconsistencies on this release.

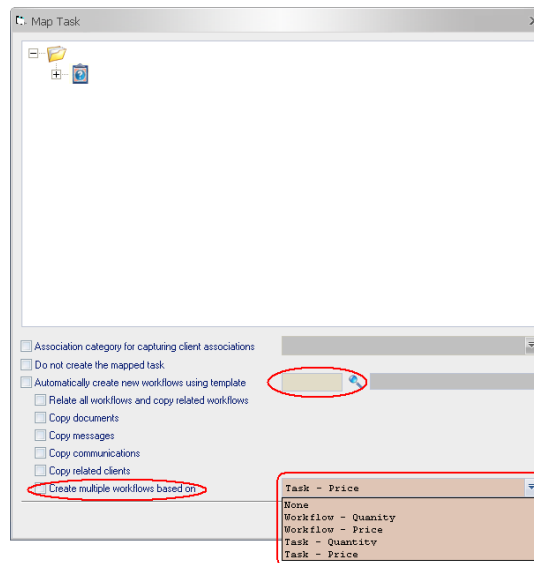
### *Modification as at release 09.03.12*

- ✚ Synergy allows sites to specify whether the target date of workflow and tasks are mandatory or optional. There is a company setting that allows the target date to be enforced globally. However, this setting can be overwritten at the workflow type level and be made non-mandatory. When this is done, the user interface will allow the workflow to be saved or approved with or without the presence of target date. In some cases, sites may want to make the workflow target date mandatory but leave the task target date optional. This requirement was impossible to configure in previous versions. We have added a new check box to the workflow category for this purpose. You can now make the entry of the target date optional for workflow and/or tasks if you wish.

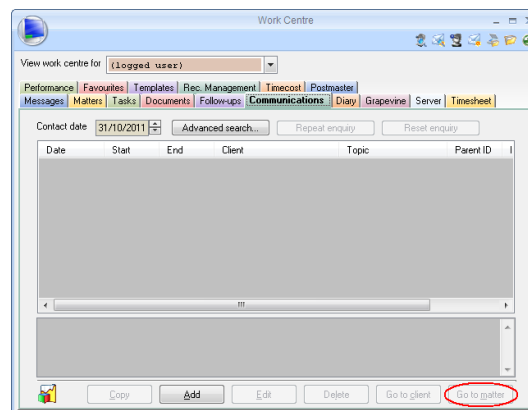
- ✚ Given that some of the numeric workflow fields can be renamed and used to store any information, in some environments, it is quite possible that these numeric fields can indicate the number of workflow that needs to be created when a decision is made. For example, in a sales environment, it is perfectly valid to create a sales workflow and as part of the sales workflow, automatically create a delivery workflow. A number of items could be sold as part of one sales process but each item may require its own delivery process. In these cases, it is impossible to configure Synergy to create the right number of delivery process. Although this could be configured as a recurring question, it is still the user's responsibility to remember how many is required and how many is actually created. To make this process simpler and seamless, we have allowed the task mapping to carry a flag indicating if any of numeric fields in the workflow or task should be used for creation of workflow items. When this setting is used, the workflow details stored in the template will be ignored and this setting is used. Please note that these numeric values can only be between 0 and 50. If these values are more than 50, a maximum of 50 workflow processes will be created. A value of zero is defaulted to 1. In the following image, the estimated fee and actual fee has been renamed as quantity and price. These are the only fields that could be used for now for this purpose.

In many cases, the sites may want to remove the workflow templates that are purely set up for decision from showing up in other places. In these cases, the Administrators can make these workflow templates inactive. However, making them inactive means that they cannot be located in the task mapping form either. We have changed the task mapping form to include the inactive templates for searches. With

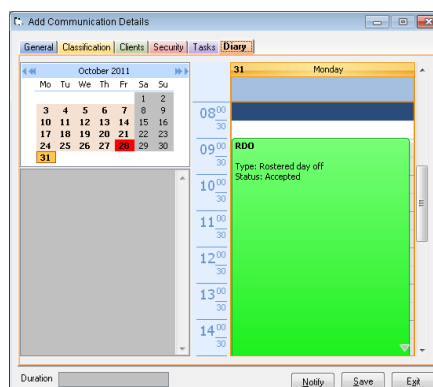
this change, all of these templates can be made inactive while preserving their use in the task mapping form.



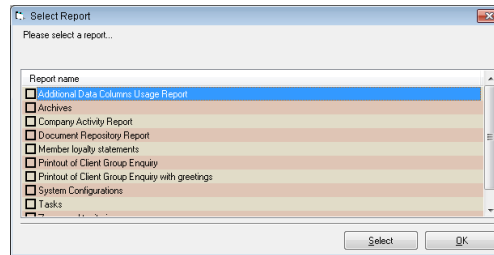
✚ We have added a “Go to matter” button to the communication tab of the Work Centre. This will allow users to load the Matter Control Centre with the matter that a communication is attached to. Please note that when there are multiple tasks/matters, one will be picked at random. However, in most cases, a communication will be linked to a single task.



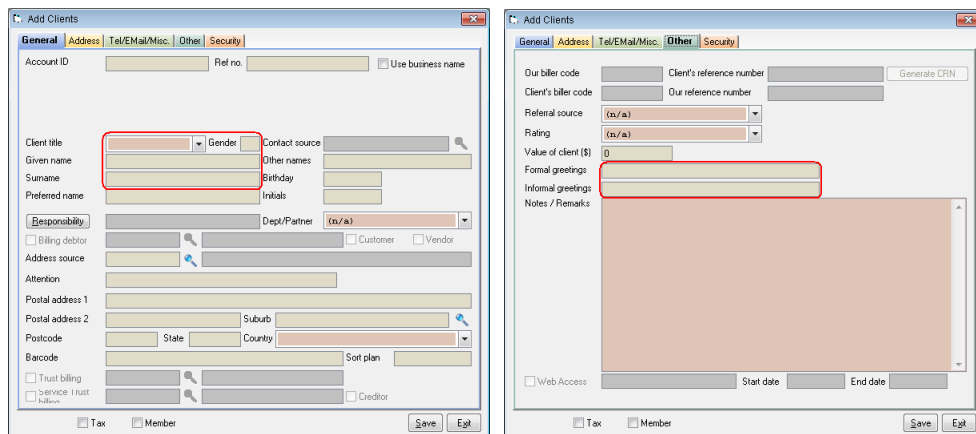
✚ To make the diary tab of the communication form consistent with other diary tabs, we have added a month control and a text box.



- In favourite tab of the Work Centre, we have allowed multiple selections when adding reports to favourites.

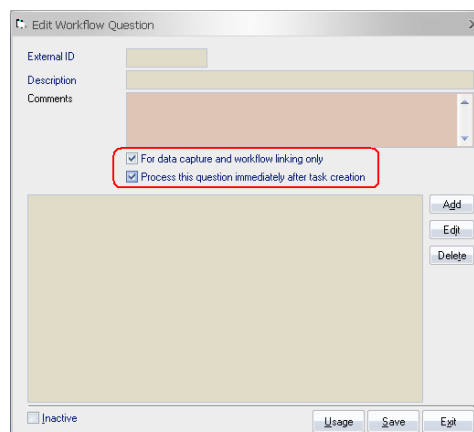


- In client edit form, when user changes the client title, given name and surname, Synergy will now automatically changes the formal and informal greetings. The informal greeting will be set to client's given name while the formal greeting will be set to a concatenation of the client title, given name and surname.



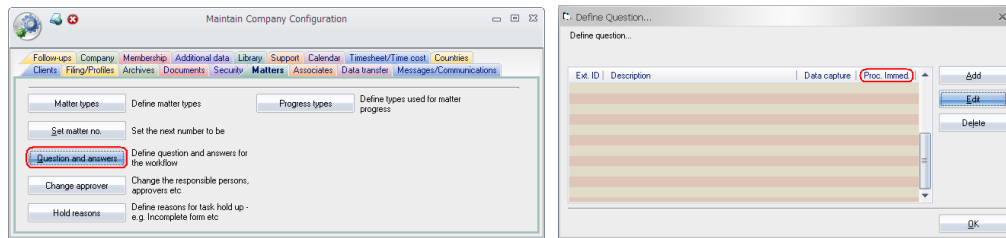
- In previous versions, when auto-forwarding messages to a staff member's external email address, synergy was creating a message file and importing these into synergy as audit file for messages even when there was no external recipient for the message. From this version, the auto-forwarded messages that do not include external recipients will not have a message audit file (.msg) given that these messages are stored in the Synergy database.

- We have allowed data capture decisions for immediate processing as well. As always, please be careful when using these features together and test every possible scenario to ensure that you do not have a possibility of loops.

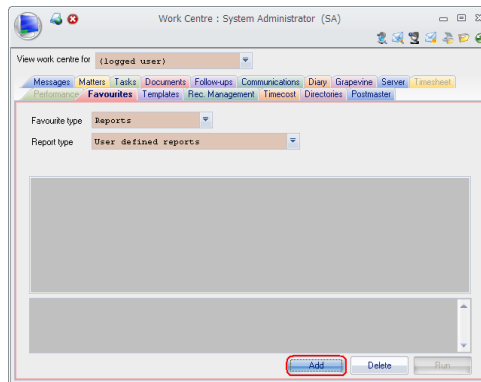




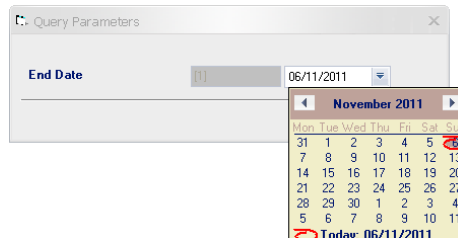
- We have added the immediate processing flag to the list that is displayed from the housekeeping form for the maintenance of questions and answers.



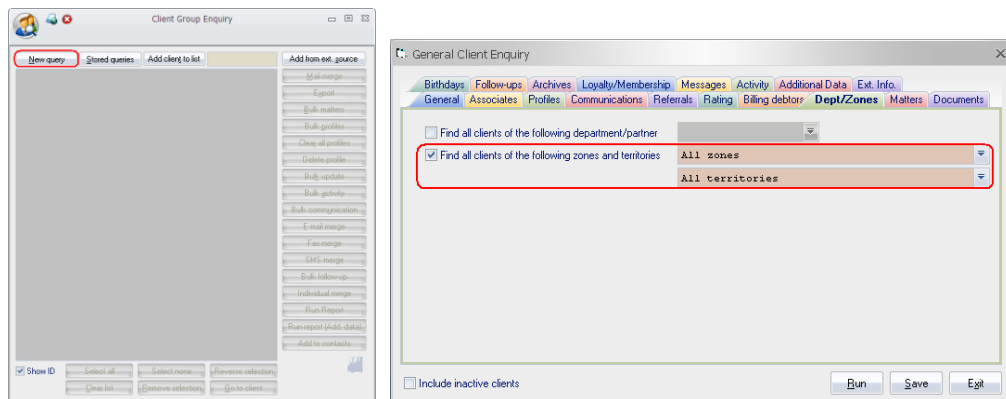
- When applying the document security for reports, we are now restricting reports that can be added to a user's favourite reports in the Work Centre.



- We have changed the report parameter form. When a date field is set up as the parameter for a report query, the form will now display a date picker. User can still type the date if they wish to do so or use the full date picker features to select the required date.

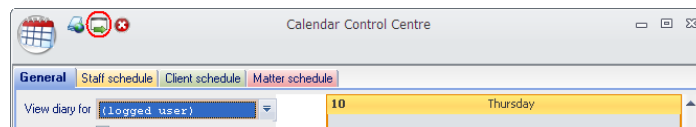


- We have added the zone and territory criteria to the Adhoc enquiry form. The Department tab is renamed to "Dept/Zones" and the new criteria is added to this tab.

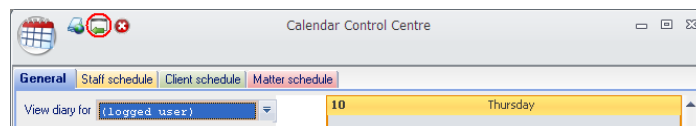


- When adding mail items, if the user selects a client for the mail item, changing address type drop down was not setting the address fields from the corresponding address for the selected client. The user had to select and deselect the override check box for this to work. This is fixed now.

- On computers with multiple monitors, we have allowed the control centres with maximise button to be floated outside the Synergy application. There will be a new icon in the quick access control bar for the control centres that can be floated. You can sink the control centre back into the Synergy application by using the sink icon. At the moment, only Work Centre and Calendar Control Centre can use this functionality on multi-monitor systems.



Float icon for the control centre

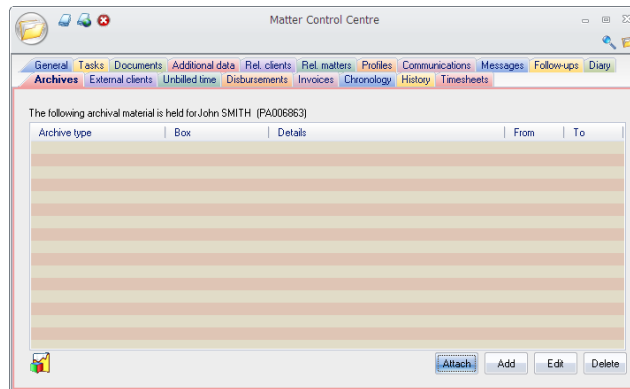


Sink icon for the control centre

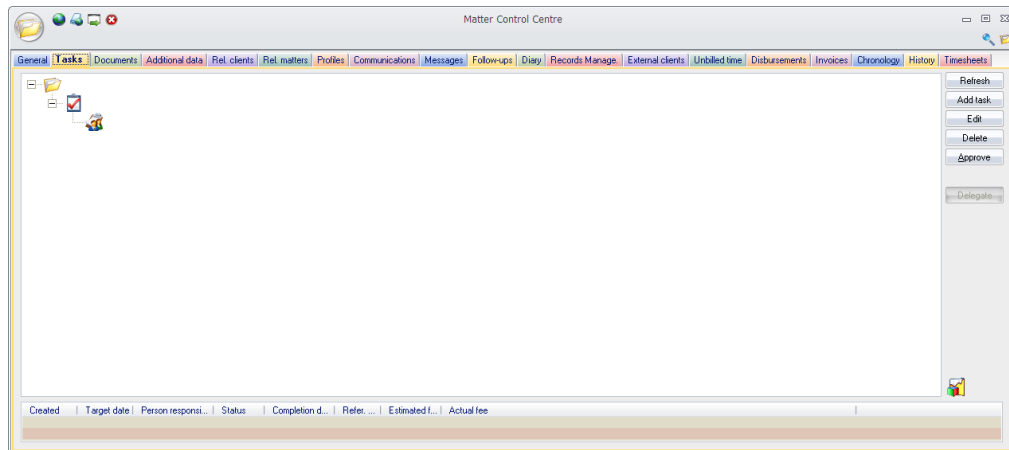
- Change the list on the archive tab of the Client Control Centre a sortable list.



Change the list on the archive tab of the Matter Control Centre to a sortable list.



We have made Matter control centre completely resizable in both directions. It can also be maximised and used as a floatable pop-up window. It will remember its size when closed. Please note that when you are allowing multiple controls centre, the setting for the last control centre that gets closed is remembered.



We have made the appointment creation form a non-modal form, allowing ability to create multiple appointments at the same time. Please note that this is only available from the Diary tab of the various control centres. The control centres will not close until all appointment forms loaded from there are successfully closed. We have also placed a minimise button on this form in case users wish to minimise the form.



We have slightly amended the quick contact creation. In many cases, the users type the details of the primary contact for the company when creating the company records. However, when they are creating the contact, they may need to re-enter the details again. The following change has been done to avoid having to retype the details. When creating quick contact for companies that do not have a contact source, that is, there is no other client linked to the company as contact source, the contact details are copied from the company record. In this case, Synergy assumes that the contact is being created is the primary contact for the company. If you have companies with multiple contacts, please ensure that you link one of these contacts as the contact source for the company. If you do not do this, every time you click the quick contact button the contact details will be copied from the company record and you will have to delete these details.



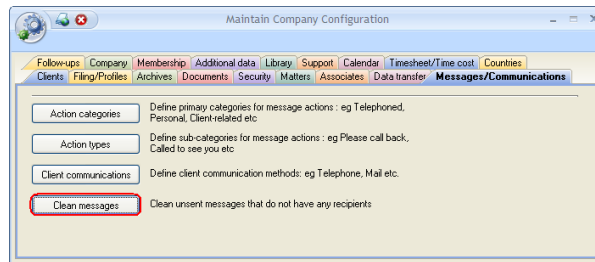
In some cases, when people are recording their telephone communication, they may require to create a company and its contact and associate the two at the same time as they are recording their communication. Currently, the company and the contact can be created by clicking the create button twice one for each but there is no possibility of associating them. We have added a quick contact button to the communication form.

When this button is clicked the following will happen if there is no primary client for the communication:

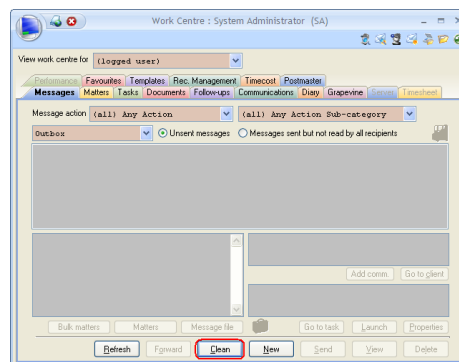
- 1) The user will be prompted to create the company client.
  - 2) The user will be prompted to create the contact client.
  - 3) The user will be prompted to associate them.
  - 4) The company client will be set as the primary client of the communication.
  - 5) The contact will be added to the client list.
  - 6) If spoke to field is blank, then it will be set to the name of the contact.
- When there is already a primary client, step 1 and 4 will not ignored but all other steps will be done as before.



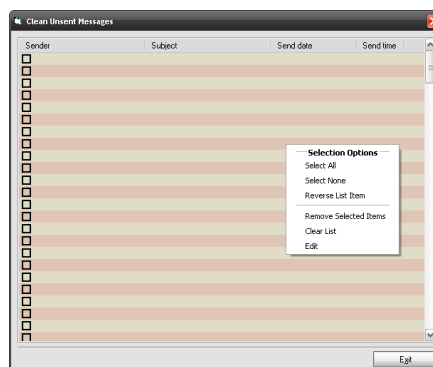
In some cases, users bail out of creating messages before they have added a recipient. In these cases, the message could remain in the database. Synergy will only display unsent messages that have at least one recipient in sender's outbox. These messages will not show up at the task or client either because they are unsent messages. Consequently, they are completely hidden from everyone. We have placed a button in the messages tab of the housekeeping form for cleaning up these types of messages.



We have also added a similar functionality to the messages tab of the Work Centre so that each user can clean up their messages. There is a new button “Clean” in the messages tab of the Work Centre when the outbox option is selected. Using this button, users can perform the same clean up for their messages.

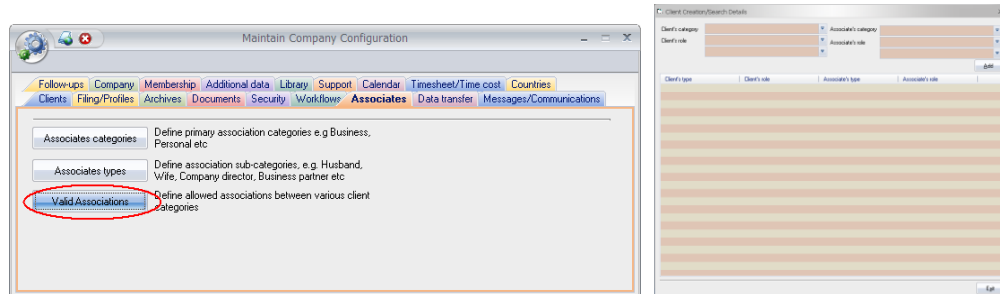


When these buttons are used, the displayed form allows users to edit as well as deleting the displayed messages using a popup menu displayed using the right mouse button. Once all messages are processed, the form will be closed automatically. Users can multi-select the entries for deletion using the popup menu. You can also edit a message. However, if you save the message, the message will only remain in the form if it still have no recipients and is unsent. Please note that no validation will be done on when deleting these messages and form will only be displayed if there are any messages to process.



### *Modification as at release 09.03.11*

- In many cases, when creating associations between clients, users could pick wrong association types. This could create inconsistency in the system. In this version, we have allowed this to be further restricted by setting up valid combination of client and associate types and association types from Housekeeping form.

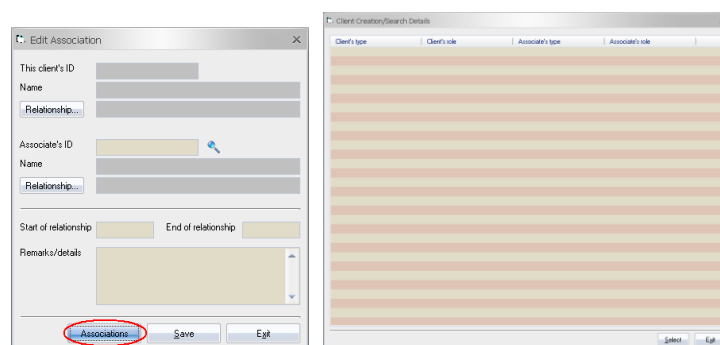


Please note that when you add a restriction, you are restricting the association for both types of clients. Consequently, you would have added all valid combination of associations for the client and associate. For example, if you have two client types called Customer and Equipment and two association types called Owner and Equipment, adding Customer/Owner, Equipment/Equipment will only allow Owner/Equipment association to be created between a customer and equipment. No other type of association can be created between these two client types. If there are other association that are valid for these two types of clients, all of these combinations must be added to the list.

When constraining the association, Synergy will not validate existing associations for validation. The changes will only apply to future associations. Please remember that when editing existing associations, these rules will be checked and if the existing association does not comply with the rules, the user will be notified. Consequently, you should be careful when setting these association rules.

Software Development Kit has been amended to comply with these changes.

- To assist users when associations are constrained, we have added a new button to the association form. When clicked, this will bring up the list of valid associations that can be created between the two clients. Please ensure that you have selected a client and associate before clicking this button. If there is no restriction, a message will be displayed notifying the user. If there is a single valid association, then the association types for both the client and associated will be set appropriately. If there are more than one possible association, the user will be presented with the list of possible associations and can select the one appropriate.





In some cases, the users may need to create a document while reviewing their follow-ups. For example, consider a company selling cars and creating warranty follow-up to keep track of the warranties. It may be required to create a notification document that should be sent to the owner of the car warning him/her that his warranty is about to run out. In this version, we have placed a document button in the follow-up form that allows users to create documents while reviewing the follow-up. We have also added the same button to the follow-up tab of the Work Centre.

Client details | Date details | Escalation

Client ID: [ ] Client name: [ ]

Type: [ ] Comments: [ ] Clear comments: [ ]

Importance: None

Contact name: [ ] Telephone number: [ ] Alternate number: [ ] Fax number: [ ] Mobile number: [ ] Pages number: [ ] VOIP details: [ ] Email address: [ ]

☐ Inactive

Save Exit

View work centre for: (logged user)

Performance | Favourites | Templates | Rec. Management | Timecost | Postmaster | Messages | Workflows | Tasks | Documents | Follow-ups | Communications | Diary | Grapevine | Source | Timesheet

My follow-ups

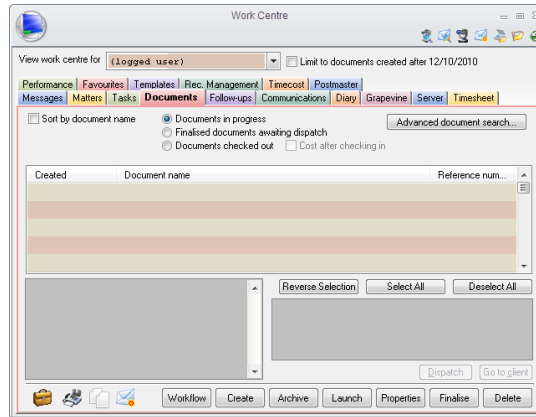
Follow-up type: (all occasions) Include inactive follow-ups: ☐ Rel. client: ☐ Due on/after: 19/10/2011 and before: 19/10/2011 Display escalated follow-ups: ☐ Include team follow-ups: ☐

Client name	Due date	Last actioned	Follow-up type	Importance	Status

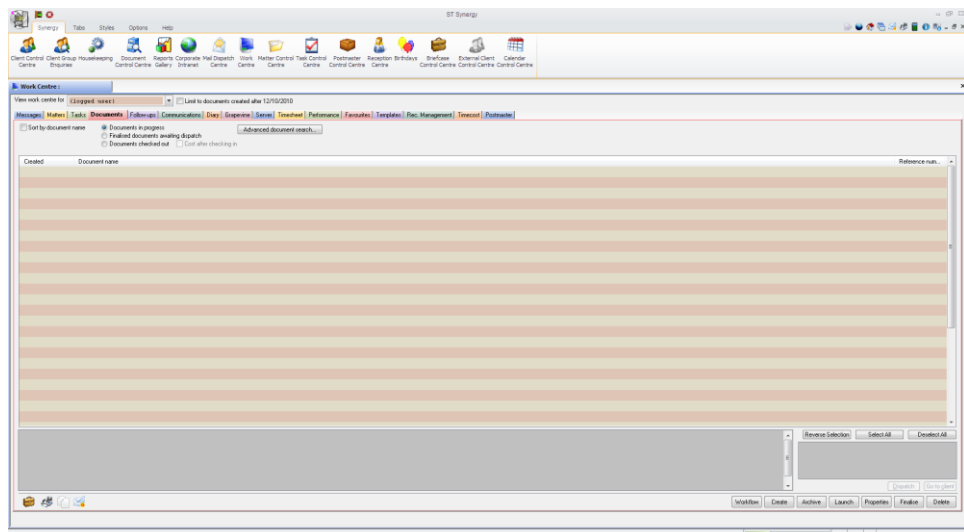
Invoice Reactivate Add Edit Mark actioned Delete Go to client

### *Modification as at release 09.03.10a*

- ✚ We have changed the list in the document tab of the Work Centre to a sortable list. Users can now use drag and drop for importation of documents and email attachments to this.



- ✚ We have made Work Centre fully resizable in both width and height. It can also be maximised.



- ✚ We discovered a bug in actioning client related follow-ups from workflow decisions. This bug is corrected on this version.
- ✚ Added ability to export documents in Software Development Kit.



### *Modification as at release 09.03.10*

- In many cases, users may want to run a user defined or additional data report using the client list that is built in the Client Group Enquiry. We have added ability to mark user defined and additional data reports for availability from Client Group Enquiry.

The image shows two side-by-side screenshots of software windows. The left window is titled 'User Defined Reports' and contains fields for 'Report document...', 'Report description', 'Access level', 'Departments/Partners' (set to 'All Departments'), and 'Query to be run prior to report being invoked' (set to '(none)'). At the bottom, there is a checkbox labeled 'Available from Client Group Enquiry' which is circled in red. The right window is titled 'Add Additional Data Report' and has tabs for 'General', 'Client Related', and 'Workflow Related'. It contains similar fields for report configuration. At the bottom, the 'Available from Client Group Enquiry' checkbox is also circled in red.

- We have added two new buttons that allows running these reports from the Client Group Enquiry. When these buttons are clicked, synergy will create a new report table from the list before running the report. Please note that when reports are linked to queries, the result of the query will overwrite the report table that Synergy creates from the list on the Client Group Enquiry. Consequently, care must be taken when designing these reports that are made available from Client Group Enquiry.

The image is a screenshot of the 'Client Group Enquiry' window. It features a large central list area and a right-hand sidebar with various action buttons. In the sidebar, the buttons 'Run Report' and 'Run report (Add data)' are circled in red. At the bottom of the window, there are several control buttons including 'Show ID', 'Select all', 'Select none', 'Reverse selection', 'Clear list', 'Remove selection', and 'Go to client'.

- A few versions back, we introduced the ability to forward Synergy messages that is sent to a user to his/her Email address. In some cases, a user may want these messages to be routed to a different Email address than his/her normal office email address specially when out of office. We have allowed an alternate email address to be stored for each user for this purpose. When auto forwarding emails, if an alternate Email address is defined for user, then that email will be used. Otherwise, the user's normal address will be used.

The image is a screenshot of the 'Edit User' window, specifically the 'User details' tab. It contains various user configuration options. In the 'Email forwarding' section, the 'Never forward' option is selected. Below it, the 'Always forward when out of office' option is highlighted with a red rectangular box. Other sections visible include 'User details', 'Email signatures', 'Toolbars', 'Email folders', 'Approval', 'Delegation', and 'Out of office'.

### *Modification as at release 09.03.09*

- ✚ We have started preliminary testing for Windows 8 and Windows Server 2011. We will keep you posted with the progress of our testing.
- ✚ For those sites that are using our Software Development Kit to allow clients to login from their web sites, we have changed the SetLoggedWebUser method definition. This method has an additional Boolean parameter that can be passed to it. This flag indicates whether the web client is defined in Synergy as internal staff. In these cases, the developer may not want to pass an internal user details and get the library to work out who the user is and log him/her in with his/her user details. When this flag is set to true, the single point login and the internal user credential should be all set to blanks and zeros. If the Web user is defined as an internal staff, then the credentials of the internal staff linked to the client will be used throughout the library. Otherwise the library will set the error object and return failure. When set to false, the user identifier and password that is passed to the method or single point login will be used as before. Please note that we have changed the library to disallow inactive users from logging in.
- ✚ Added ability to tie query parameters to the logged user external and internal identifier. When this is done, the corresponding parameter will be set to the user detail as appropriate and will be locked from modification by user. All the list values and default values will be ignored for these parameters.

Parameter Description

Data type: Text Upper case

Maximum length: 5

Substitution type: User External Identifier

Mouse hover text: None

Picture format: Matter Number

Minimum value: Client Account Number

Maximum value: User External Identifier

Default value: User Identifier

☒ Has list

List value: Inactive

Save Exit

If these queries using these parameters are linked to reports, reports will behave identically when run. The only time that we allow these parameters to be altered is when reports are run from the Reports Gallery or the query is run from the “Run For Report” button from the stored queries form.

Stored Enquiries

Department: All departments

Add Edit Delete Run Run For Report

Restrict the enquiry to the following client id range...

From To

Exit

Reports Gallery

System reports Other system reports

User gallery

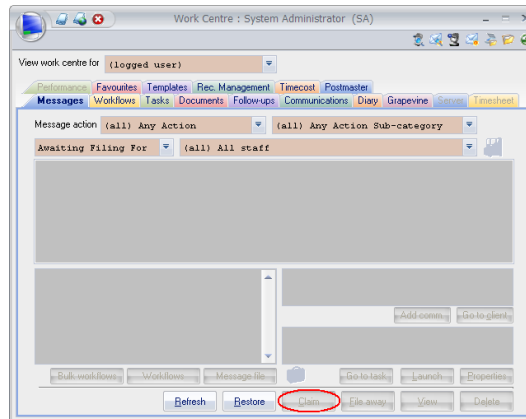
Additional data reports

PDF options

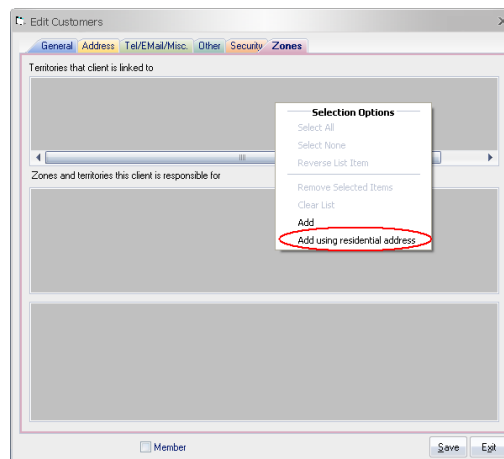
Convert and report Convert only Run Edit Delete



- There was a bug in claiming messages for team based filing clerks from the Work Centre. The claimed message was not being removed from the list for other team members. This is fixed now.



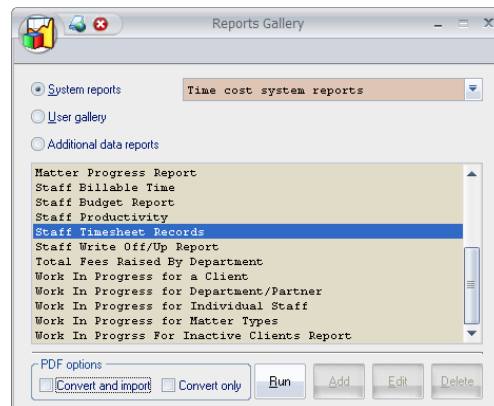
- In previous versions, automated client zoning was only available in add mode. However, in a number of occasions, the require post code may not be available at the time adding a client. We have made it easier to link the client using the specified post code from address using a new menu item. This menu item will be available in both add and edit mode. When selected, the application will use the appropriate post code to find the correct territory and add that to the list.



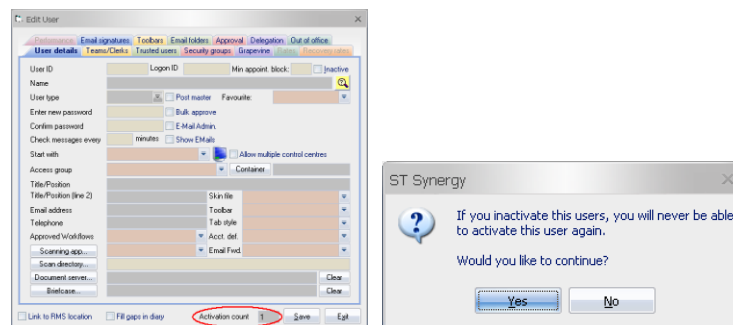
- Added a new property to the document search class in our Software Development Kit allowing developers to search for web accessible documents.
- A couple of versions back, we introduced a setting at the workflow type allowing sites to force Synergy to use the logged user and the default team for the logged user when creating a workflow. This was not working properly and should be fixed on this version.

### Modification as at release 09.03.08

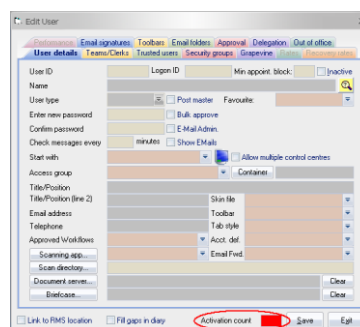
- We have added a new time cost report called “Staff Timesheet Records”. This report allows sites to get a report of all approved timesheet entries for selected users. Users can specify the date range for the report. They can also specify whether a summary or detailed report is required. For summary report, the total time will be displayed for each day. For the detailed report, the time for each timesheet entry will be displayed. In both case, a cumulative total will also be displayed. To run this report, the logged user must have access to time costing reports.



- We have discovered that a number of sites are using activation and inactivation of users to avoid licensing requirements. In this version, we have limited user activation to no more than 10 times. A history of activation and inactivation will be kept in the system. Synergy will warn the user when s/he tries to inactive the user when the limit is reached. If a user is inactivated beyond this point, it can never be activated again. The number of times a user has been activated will be displayed in the user edit form.

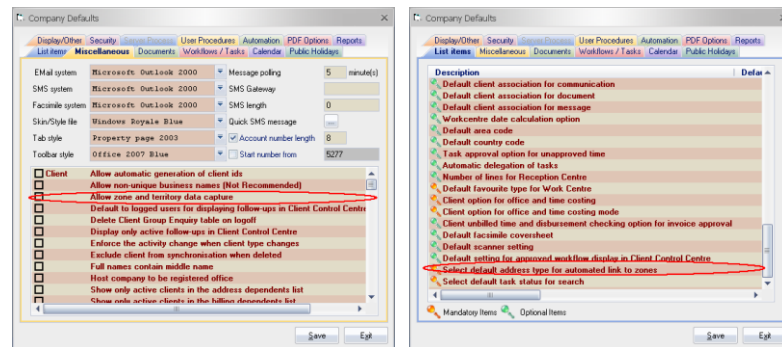


When the activation count limit is close (one less than the limit set for the system) the background colour for the activation count filed will be set to red.

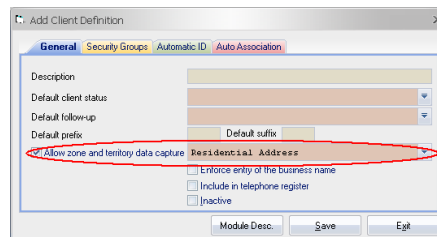




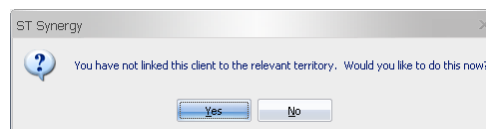
In previous versions, we added zone and territory segmentation of the clients. This was done from company defaults form.



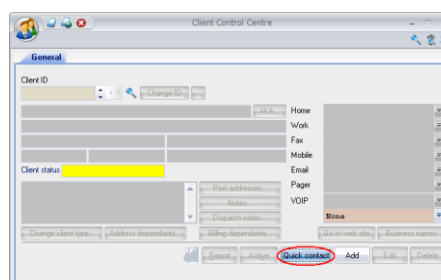
We have made this more flexible in this version by allowing each client type to carry its own setting. If you turn on the zone data capture at the client type, this will overwrite the setting at the company default. If you turn off the zone data capture at the client type level, then the company default setting will be used. To avoid any confusion, we recommend turning off the company default setting and using the client type setting since this is a more flexible approach.



During addition of a client record, when zone data capture was enabled, the user would have been prompted if the relevant territory and zone was not in the territory list. In this version, we have removed this prompt and allowed the zone to be added automatically without any user interaction.



In the previous versions, the “Quick Contact” button was only enabled when the Client Control Centre already had a client displayed. In this version, we have enabled the quick contact button all the time. This way, even when there is no client selected in the Client Control Centre, one can create the client, quick contact and associate them by click of one button rather than having to create the client first, and then click the quick contact button to proceed with creation of the quick contact.

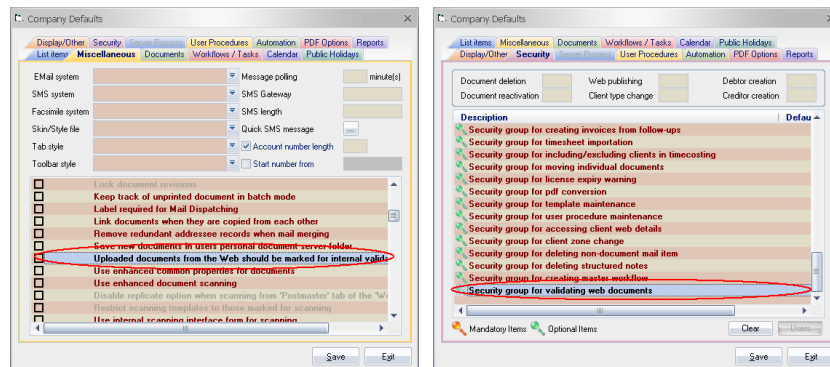


- When selecting associations in Client Control Centre, we are now displaying the remarks for the association at the top of the grey text box since in 99.9% of the time, the start and end dates will be blank.
- When creating a non-recurring one-off follow-up, Synergy was always setting the next contact date to be the same as the creation date even if the follow-up type had information that could allow calculation of the next contact date. For example, image creating a four weeks sales follow-up type. You can set the recurrence number to 4 and the recurrence unit to week for this follow-up type. However, when creating a four week follow-up, these setting were being ignored. We have amended Synergy to use the information for calculating the next contact date. Please note that this is only done when creating new follow-ups and you have a non-zero recurrence number for follow-up type.

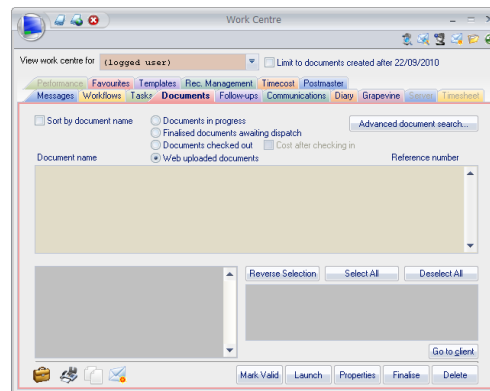
- Synergy was always adding a + to telephone and fax numbers. We have changed this so that the + sign is only added if the country code is entered. For mobile numbers, the + sign will only be added if the first digit of the number is not a zero. If the first digit is zero, the + sign will be removed. Pager number is exempt from this and will be displayed as entered.
- Added field name as well as tool tip text for telephone number in the client edit form.

- For those customers that are using our Software Development Kit to upload documents from their web site, we have added facility to mark uploaded documents for internal validation. We have also added a new security group to allow the administrators to specify who are allowed to validate these documents. Please note that uploaded documents will be secured to the specified security group and other users will not be able to access these documents until the validation is done. Loading the properties form, finalising or dispatching these documents by any of the

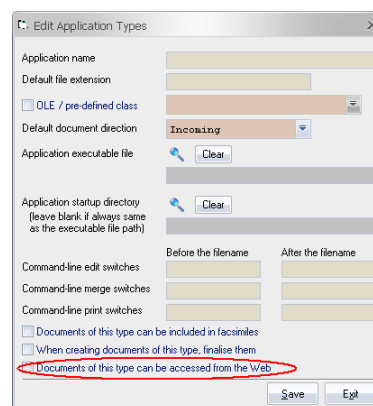
nominated users will unmark the document and remove the security nominated security group from the document.



The web uploaded documents can be processed anywhere that a user has access to it. However, to make this easy, we have added a radio button to the documents tab of the Work Centre for displaying these documents. Some useful functions are also available for these documents from this tab.



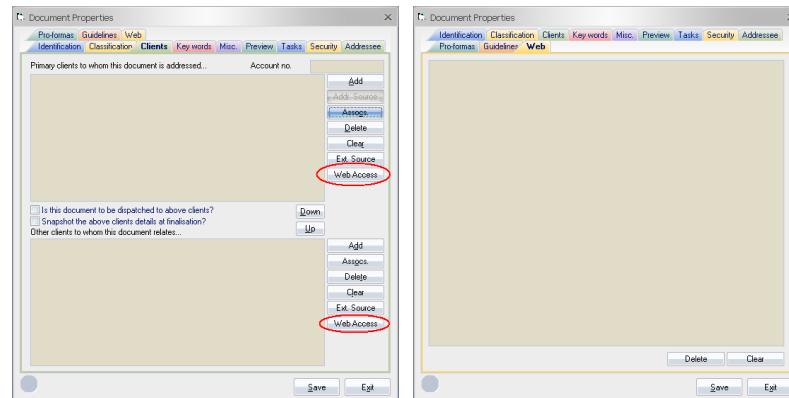
For those customers that are using our Software Development Kit and would like to have tighter control on which documents should be accessible through Web to their customers, we have added facility to do this. The application types have been extended to carry a flag indicating whether documents of that type should be accessible via the Web.



Once the document type is allowed to be exposed through the Web, users can specify which clients have access to a document using the clients tab of the document properties form. The client must be in either primary or related client list in order to have Web access to the document. Users can multi-select the clients from either



primary or related client list and press the “Web Access” button. This will add the selected entries to the client list in the “Web” tab. Removing clients from the “Clients” tab will remove their web access as well.

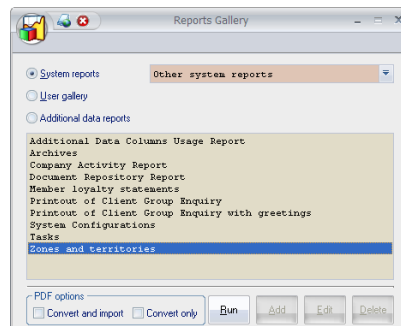


You can remove Web access for a client by clicking the Web tab and removing the client from the list. This will leave the client linked to the document and will only remove the client’s Web access for this document.

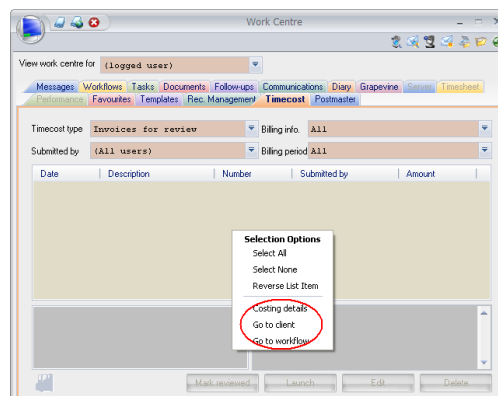
The client object in our Software Development Kit library contained a method for extracting client documents. We have added a new option to this method allowing developers to extract web accessible documents for a given client. Please note that for a document to be accessible to Web, the application type must allow Web accessibility.



In previous versions, accessing zones and territories report was not working. We have fixed this on this release.

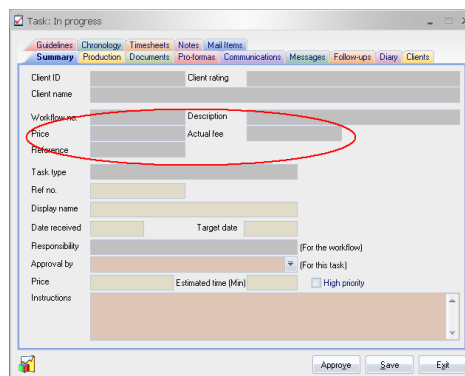
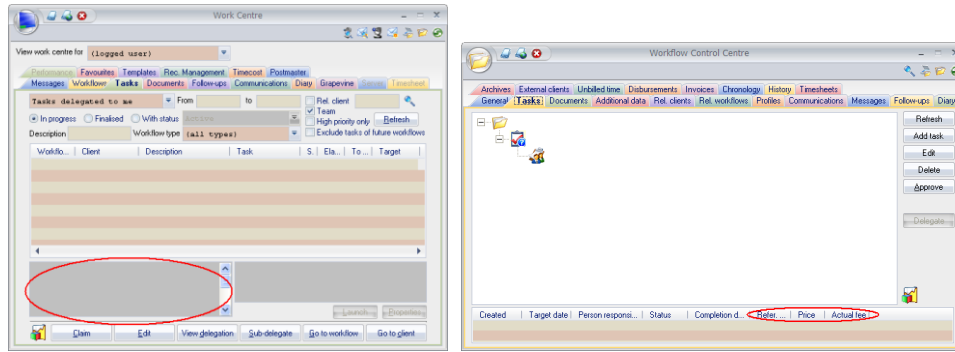


In the time cost tab of the Work Centre, the costing details, go to client and go to matter menu items were not working. This has been fixed on this version.

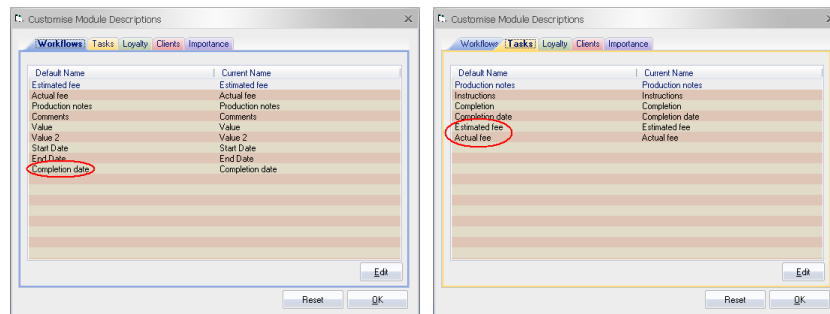




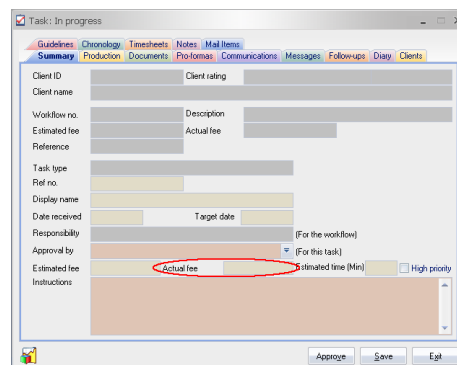
We are now displaying the matter reference number, estimated and actual fees in the task tab of the Matter Control Centre, the bottom left hand details box in the task tab of the Work Centre and the task edit form.



We have added module description entries for the actual and estimated fees for task types as well as completion date for matter types.



We have moved the actual fee in the task edit form to the summary tab.



- ✚ We have added inactive users to the bottom of the user drop down list in the client edit form to allow administrators to clone inactive user if they wish.

The screenshot shows the 'Add Staff members' dialog box with the 'Security' tab selected. It contains fields for 'Our biller code', 'Client's biller code', 'Client's reference number', and 'Our reference number'. There are also dropdown menus for 'Referral source' and 'Rating'. A text area for 'Value of client (\$)' is present. Below these are fields for 'Formal greetings' and 'Informal greetings'. A large text area for 'Notes / Remarks' is at the bottom. A 'User to clone' dropdown menu is visible, showing a list of inactive users. A 'Web Access' checkbox is also present.

- ✚ When cloning users, we are now copying the delegation restriction and the default security groups as well.
- ✚ There was a bug in deleting users. Synergy was not correctly handling the forwarded follow-up table. This is corrected now.
- ✚ We have altered the age calculation of the client in the Client Control Centre to consider the exact date of birth. Please note that if the date of birth falls on 29<sup>th</sup> of February, 28<sup>th</sup> of February will be used for calculation on a non-leap year.
- ✚ We have added the ability to attach multiple matter and clients types in the profile form.

The first screenshot shows the 'Profiles' dialog box with the 'Clients' tab selected. It has fields for 'ID', 'Description', and 'Client dispatch method'. Below these is a list of client types with 'Add' and 'Delete' buttons. At the bottom are 'Select All', 'Select None', and 'Reverse selection' buttons, along with checkboxes for 'Inactive', 'Available for external clients', and 'Use as specialty'. The second screenshot shows the 'Select Client Types' dialog box with a dropdown menu set to 'All'. It has two large empty areas for 'Client Types' and 'Chosen items...'. At the bottom are 'Save' and 'Exit' buttons.

- ✚ When selecting profiles, users can now search by the profile description and extended description. To do this, enter character string that you would want to search in the description field and then press the enter key.

The screenshot shows the 'Select Client Profiles' dialog box. It has dropdown menus for 'Profile categories' and 'Client dispatch methods', and a text field for 'Description'. Below these is a 'Profile detailed category' field. There are two large empty areas for 'Profile detailed category' and 'Chosen items...'. At the bottom are 'Save' and 'Exit' buttons.



**General search criteria** Additional data search criteria

Client title/AKA	h/w/tax/mobile	Country	Area	Phone number	Extension
Business name	Postal				
Given name	Suburb		State		
Surname	Postcode		Country		
Preferred name	Tax file number		Ref. no.		
Client ID	Business no.		ABN		
E-mail address	Activity reason	(all types)			
BPay CRN		<input checked="" type="checkbox"/> Active clients <input type="checkbox"/> Inactive clients			
Date of birth	=	<input checked="" type="checkbox"/> Debtors only <input type="checkbox"/> Creditors only			
Client type	(all types)	<input type="checkbox"/> Debtors only <input type="checkbox"/> Creditors only			
Client base type		<input type="checkbox"/> Debtors only <input type="checkbox"/> Creditors only			
Dept/Partner	(all dept/partners)	<input type="checkbox"/> Debtors only <input type="checkbox"/> Creditors only			
Responsibility		<input type="checkbox"/> Debtors only <input type="checkbox"/> Creditors only			
Monies	(all monies)	<input type="checkbox"/> Debtors only <input type="checkbox"/> Creditors only			
Territories	(all territories)	<input type="checkbox"/> Debtors only <input type="checkbox"/> Creditors only			

☒ Search business names
 ☐ Non-members only
 ☐ Non-contacts only
 ☐ Members only
 ☐ Contacts only
 ☐ Tax clients only

Stored query    Favourites    **Search**

☐ Store search criteria       

The screenshot shows a web-based application titled "C:\ Maintain Security Groups". The interface includes a header bar with a blue gradient. Below it, there are three input fields: "ID" (with a small orange box), "Description" (with a larger orange box), and a third unlabeled field (with a small orange box). To the right of these fields are two vertical scroll bars. Below the input fields is a table with three columns: "User ID", "User name", and "Inactive". The table has multiple rows with alternating light yellow and light orange background colors. At the bottom left, there is a checkbox labeled "Inactive". At the bottom right, there are two buttons: "Save" and "Exit".The screenshot shows a window titled "Add Follow-up Detail Category". It contains several input fields and controls:

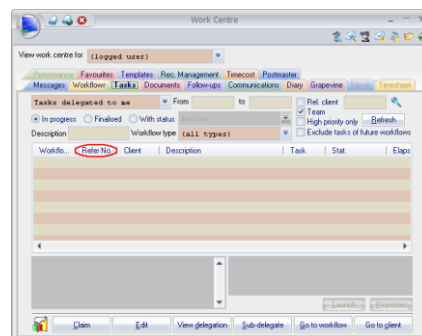
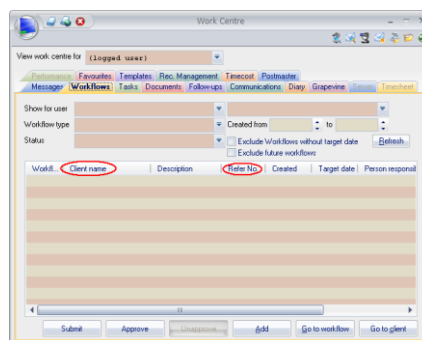
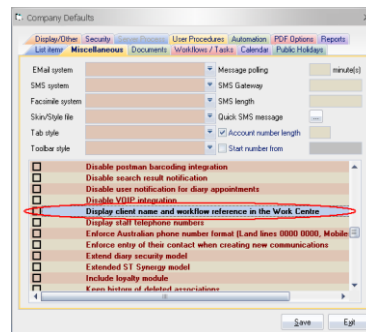
- "Category": A dropdown menu.
- "ID": An input field followed by a label "Default notice for follow up (in days)" and another input field.
- A checkbox labeled "Rekurs every" followed by an input field.
- A checkbox labeled "Disable entry of amount".
- "Description": A large text area.
- "Message template": A dropdown menu highlighted with a red rectangle.
- "Communication template": A dropdown menu.
- A section with columns "Ext ID" and "User name" containing a large greyed-out table.
- Buttons "Add", "Remove", and "Clear" on the right side of the first table.
- A second identical section below it.
- At the bottom left, a checkbox labeled "Inactive".
- At the bottom right, buttons "Save" and "Exit".

The screenshot shows the 'Add Follow-up' window in Microsoft Dynamics CRM. The window has three tabs: 'Client details', 'Date details', and 'Escalation'. The 'Client details' tab is selected. The window contains the following elements:

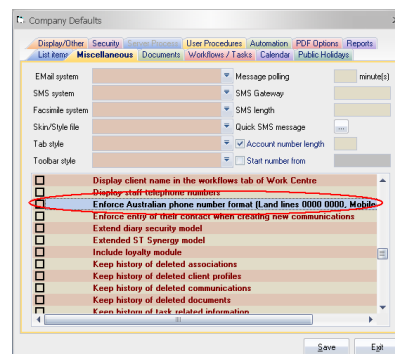
- Client details tab:**
  - Client ID:** A text field.
  - Client name:** A text field.
  - Type:** A dropdown menu.
  - Comments:** A text area with a 'Comments' button (speech bubble icon) and a 'Clear comments' button.
  - Communication:** A button with a speech bubble icon.
  - Send message:** A button with an envelope icon.
- Form fields:**
  - Importance:** A dropdown menu.
  - Contact name:** A text field.
  - Telephone number:** A text field.
  - Alternate number:** A text field.
  - Fax number:** A text field.
  - Mobile number:** A text field.
  - VOIP details:** A dropdown menu.
  - Pager number:** A text field.
  - Email address:** A text field.
- Bottom section:**
  - Inactive:** A checkbox.
  - Save:** A button.
  - Exit:** A button.



In previous versions, we added a setting to display the client name in the workflow tab of the Work Centre. In this version, we have extended it to include the workflow reference number. We are also using this setting to display the workflow reference number in the task tab of the Work Centre.



Added ability to enforce the telephone numbers to conform to Australia phone and mobile numbers. When this setting is turned on, the land lines (fax and phones) are formatted as 0000 0000. Any extra digits will be left on the left hand side. The mobile numbers are formatted as 0000 000 000 unless they have a + on the left hand side in which case they will be formatted as 000 000 000 with any extra digits and the + sign occupying the left hand side



Mobile number examples:

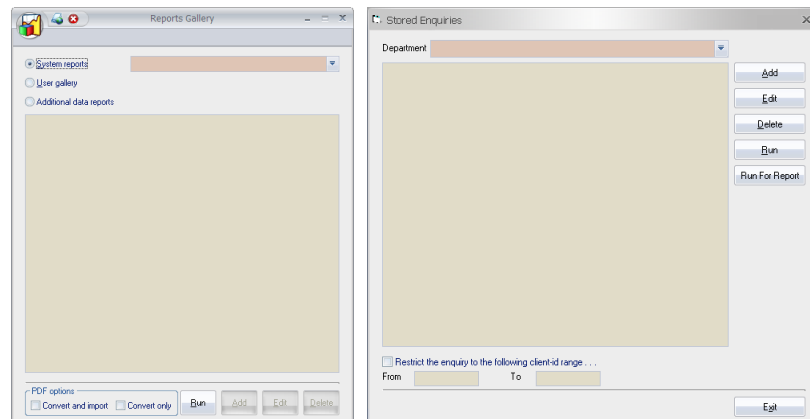
+000000000000 will be formatted as	+00 000 000 000
000000000000 will be formatted as	0 0000 000 000
00000000000 will be formatted as	0000 000 000

Land line examples:

+000000000000 will be formatted as	+000 0000 0000
000000000000 will be formatted as	000 0000 0000
00000000000 will be formatted as	00 0000 0000
000000000 will be formatted as	0000 0000

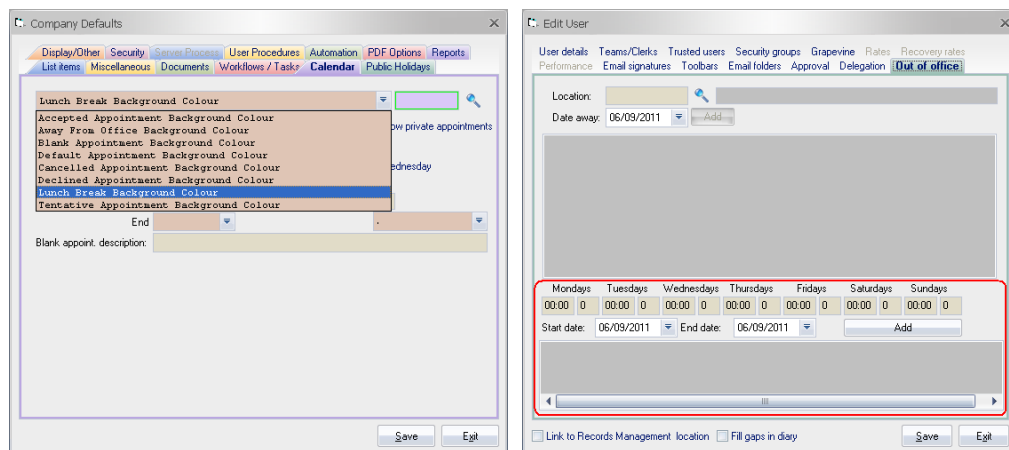


The width and height of the Reports Gallery and the stored query forms have been increased to accommodate more entries.

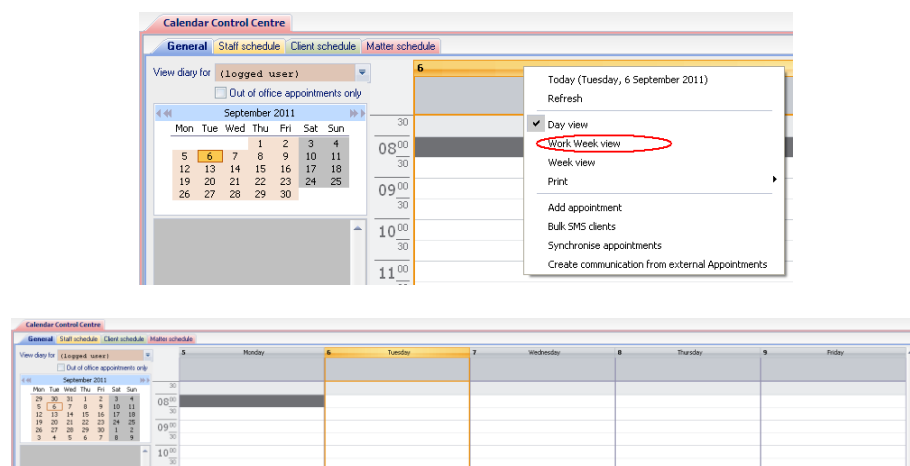


## Modification as at release 09.03.07

- ✚ Synergy is now compatible with QuickBooks 2011-2012.
- ✚ Synergy is now compatible with Enterprise version Elite tax (SQL Server edition).
- ✚ We have allowed sites to specify lunch breaks for users for every day of the week. These lunch breaks have their own colour coding. When defined, the diary will display the lunch breaks as set for the user. Please note that we keep the history for these lunch breaks to allow us to display the lunch breaks as it was on the specific date. These lunch breaks is only visible in user related diary, that is, the lunch breaks will not be displayed on Matter Control Centre, Client Control Centre etc. The start time of the break and duration should be entered for each day. If there is no lunch break on a day, leave the duration as zero.

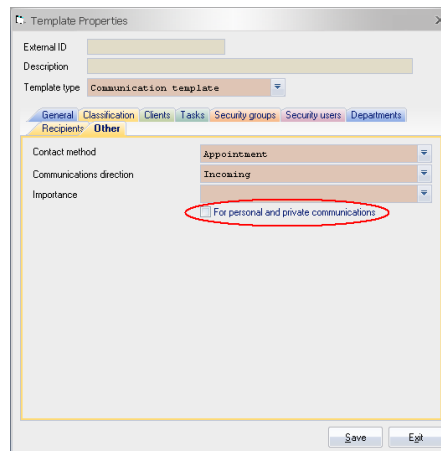


- ✚ We have added a work week view to the calendar similar to outlook 2007. Please note that in work week view, the definition of work week will be set to those days that are specified in the calendar tab of the company default. Remember that with work week view you will be unable to view the non-working days.

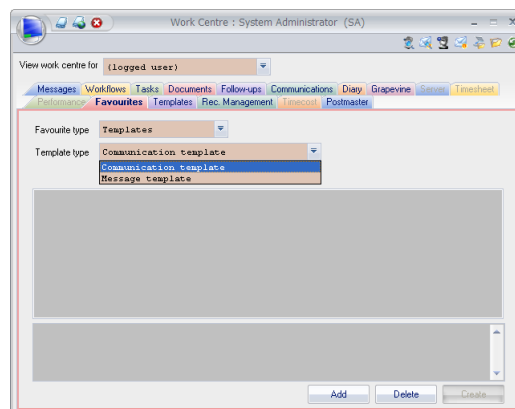


- ✚ In previous versions, the creator of the communication, the author and typist of the document did not have access to open the communication or document despite the fact that they created the entity. In this version, we have allowed these people to have access to the entities.
- ✚ In some cases, the users may want to create personal communication that is linked to their own client records and have their name in the spoke to field. These communications could generally be required for reporting purposes. We have added

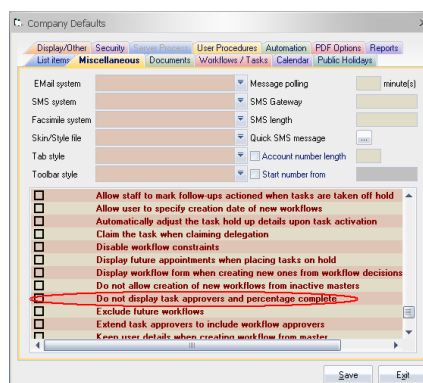
a setting to the communication section of templates to allow creation of personal communications. When this setting is in place, the primary client of the communication will be set to the client record of the logged user. The user's name will be set in the spoke to field as well.



We have added templates to the favourite list. For now, we only allow communication and message templates to be added. This may be extended in the future. Using the create button, the users can create a message or communication using the selected template.

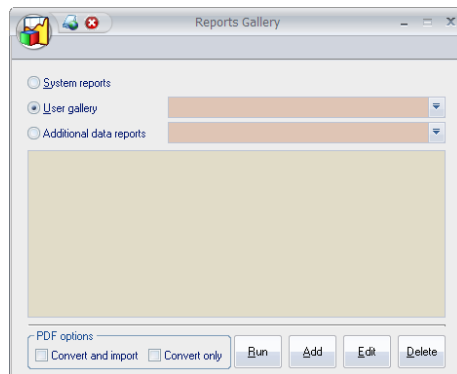


In some cases, the task tree view becomes cluttered when there are too many tasks. We have allowed sites to remove the task approver and percentage complete from the tree view nodes from house keeping, company defaults. Please note that the active and on-hold tasks will always display these details regardless of this setting.

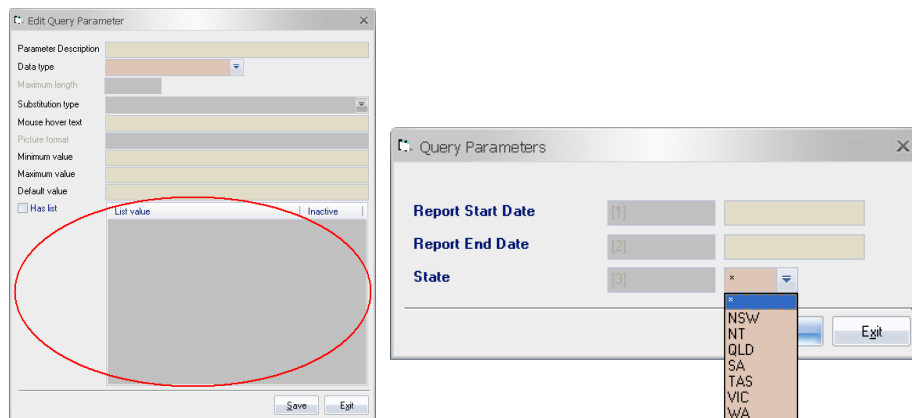




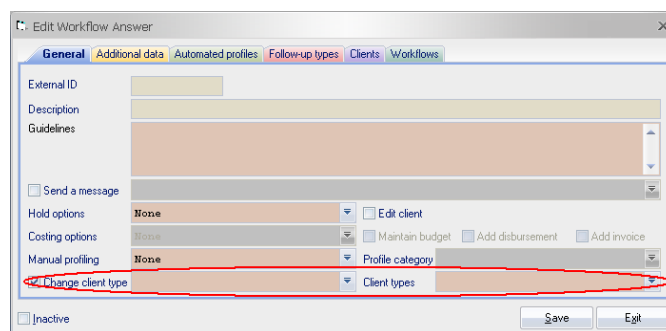
- When using the document security to restrict reports, we now filter out those reports that users do not have access to.



- We have added the ability to have a list of values to be stored against the query parameters similar to the additional data columns. This could be useful in many cases.



- We have added the flexibility to change the client type when workflow decisions are made. The users can optionally specify the client category and type.



When the workflow decision is made:

- If a client category is not specified, then the user is prompted to select client category and type.
- If the client category is specified without a client type, the combination of the specified client category and the client type from the primary client of the workflow is checked for existence. If this combination exists, then it will be used for changing the client type.
- Otherwise the user will be prompted to select a client type.

Please note that the client edit form will only be displayed if the Edit check box is selected. Otherwise, the client type is changed automatically without the client edit form being displayed.

Client type will only be changed if the new client category is different to the client category of the primary client. When the client category is the same, the code will ignore this setting.

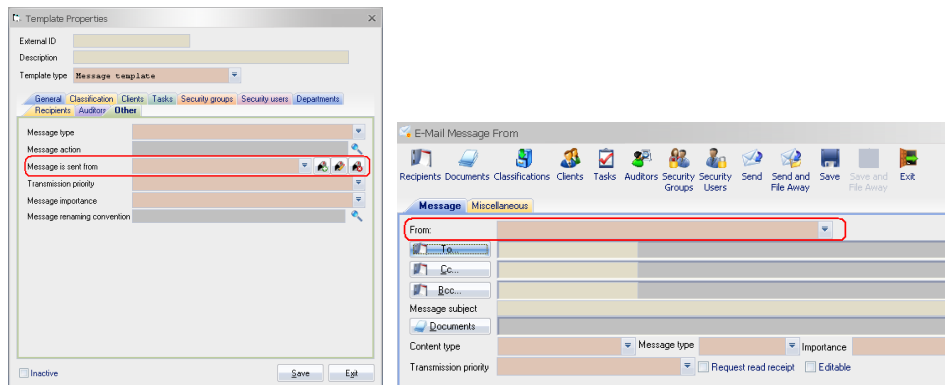
- ✚ We have added ability to manually profile workflow as well as client as part of a decision. In many cases, it will be impossible to determine what type of profile a client will or workflow should have before hand. In these cases, the user processing the workflow has to determine the profiling requirement. Please note that you can optionally restrict the profile category that is displayed to the user. Leaving the profile category blank, will allow users to select any applicable profile. We allowed client and/or workflow to be profiled if required. Please note that if you select client and workflow, only the profiles that are allowed to be linked to both are displayed.

- ✚ In previous versions, the invoice check box in the answer form was not considering whether time cost was enabled or not. This is now fixed.

- ✚ We have moved the actual fee from the production tab of the workflow edit form to the summary tab.

- ✚ In the diary tab of the Work Centre, the text box was covering part of the date picker. We have fixed this.
- ✚ When selecting today from the popup menu of diary, it was not displaying the current date. This is fixed now.
- ✚ In previous versions, we added a company setting to allow from box to be displayed in the E-mail form. This was done so that users can see and specify a “Send On

Behalf Of' mail box address. In this version, we have allowed a list of valid mail box addresses to be stored in the system. Users can no-longer type whatever they wish in from field of the Email form as it was too dangerous to allow anyone to type anything in the from field. Instead of a text entry field, users will now be presented with a list of valid mail box addresses that they could select from for email being sent out. This will certainly reduce the chances of errors and will ensure that the valid mail box addresses are used. Please note that when emails and templates are saved, the actual mail box address is stored for these entities rather than a link to the new mail box table. You can add, edit or delete the mail box entries from any message template.

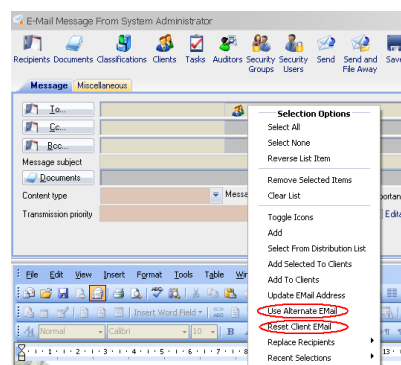


Please remember that after upgrade to this version, the new mail box table will be created from the existing templates. If you have more than one template using a mail box address, the first description of the template (in alphabetical order) will be used as the mail box description. You may need to revisit the mail box address details and set the descriptions properly. To do this you:

- 1) Click the add button from the template maintenance form from housekeeping,
- 2) Change the template type to message template,
- 3) Click on the other tab,
- 4) Select the proper entry from the "Message is sent from" dropdown,
- 5) Click the edit button and fix the description.
- 6) Repeat editing for all entries and once finished, click the exit button.

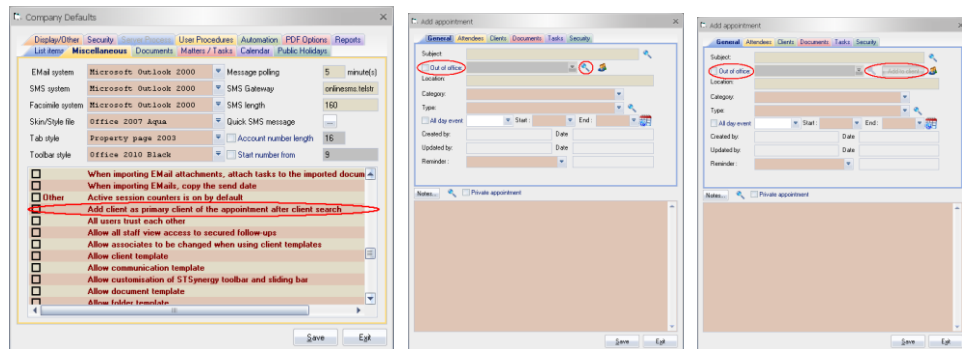


We have allowed alternate client email addresses to be used for sending emails from Synergy. To do this, use the menu item to select an alternate email for the client. If the system only finds one email address, then it will simply use that. If there are more, then the user will have to select one. There is no link to the original alternate email address used. The email address is duplicated and stored along with the message at the time of use. So, the alternate email addresses can be changed or deleted without affecting any messages stored in the system.

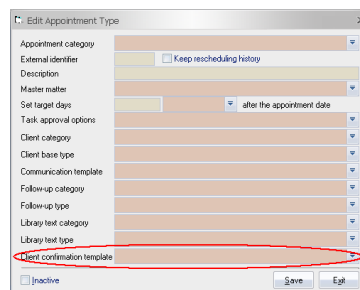


## Modification as at release 09.03.06

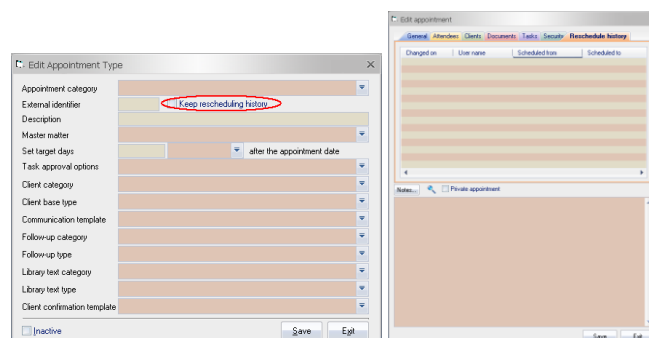
- In appointment edit form, the client search button was tied to the checked status of the out of office setting. We have added a new setting to the housekeeping that allows this button to be enabled all the time. With this setting, when you search and find a client, it will be automatically added to the primary client list of the appointment. Please note that with this setting in place, the “Add to client” button will be invisible because this is done automatically.



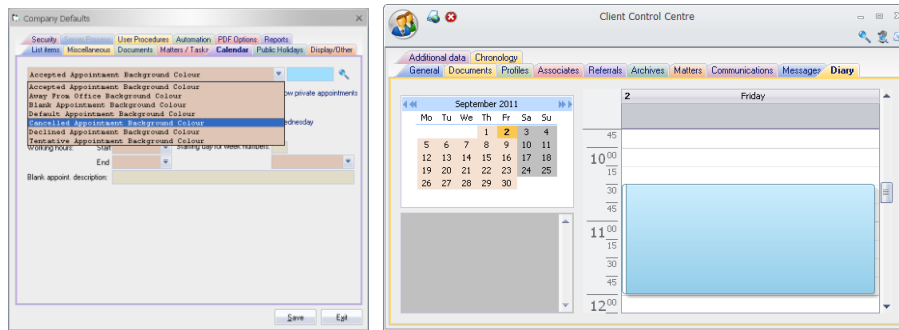
- In previous version, we allowed a system wide message template to be stored for sending confirmation emails to clients when appointments are created. We have moved this setting to the appointment types because not all appointments may require confirmation or different appointment types may have different confirmation email content. The current setting will be copied to all appointment types. Using the appointments tab of the housekeeping form, please reset those appointment types that do not require a confirmation email or require a different confirmation email.



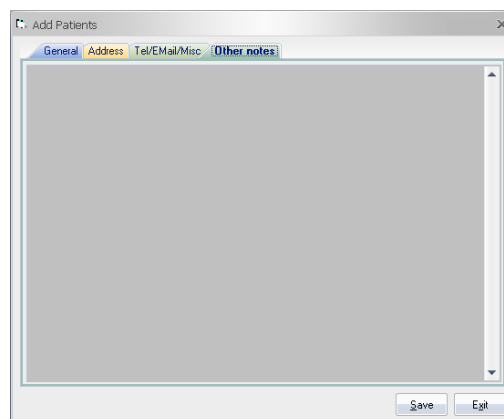
- We have also added a check box to the appointment type to allow a history of rescheduling to be kept for appointments. With this check box turned on, when the date or time of an appointment changes, the old and new date and time is recorded in a history table along with the user and the time that it was done. These will be displayed in a separate tab in the appointment edit form.



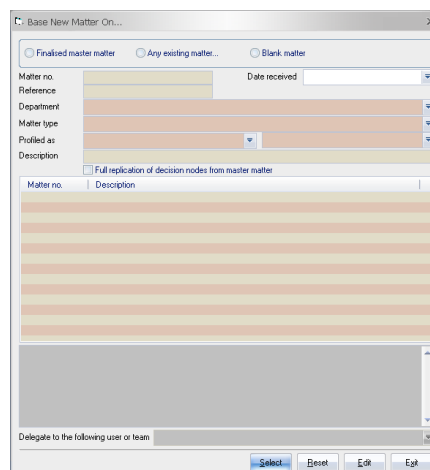
- We have also added a cancellation status for appointments. All menu option for modification of appointment will be invisible for cancelled appointments. We have also added a colour coding for the cancelled appointments than can be set from the calendar tab of the company defaults form. Cancelled appointment will not be displayed on diary tab of the Work Centre, general and staff schedule tabs of the Calendar Control Centre and the diary tab of the application shortcut bar. They will be displayed everywhere else.



- When creating clients as part of making a diary appointment, users may have added some information in the notes section of the appointment which may be useful in client creation stage (e.g. name and address details etc). We are now passing the appointment notes to the client creation forms and displaying them in a separate tab.



- We have removed the responsibility column from the master matter selection form.





In matter search form, when searching the master matters, the search was including all masters. To avoid users using inactive masters, when masters only check box is clicked, we set the active check box by default so that only active masters are listed.

The screenshot shows a 'Matter Search' window with two tabs: 'General search criteria' and 'Additional data search criteria'. The 'General search criteria' tab is active. It contains various search fields and filters. A red circle highlights the 'Masters only' checkbox, which is checked by default. Other filters include 'Active', 'Include completed matter', and 'Exclude future matters'. The 'Additional data search criteria' tab is also visible, showing fields for 'Primary client', 'Matter type', 'Approval by', 'Profiles', 'Profile subcategories', and 'Importance'. The bottom of the window has a large grey area for search results and a sidebar with buttons: 'Fav.', 'Begin', 'Select', 'Reset', and 'Exit'.

General search criteria		Additional data search criteria	
Matter no.	Year	Primary client	
Reference no.		Matter type	
Created by		Approval by	
Description		Profiles	(All profiles)
Received from	to	Profile subcategories	
Completed from	to	Importance	
Target from	to		
Related client			

☒ Masters only ☐ Non masters only  
☒ Active ☐ Inactive  
☐ Include completed matter  
☒ Exclude future matters

Fav. Begin Select Reset Exit

### *Modification as at release 09.03.05b*

- In previous versions, Synergy was allowing maintenance of client and association from workflow decisions. In setting this feature, Synergy was insisting on a client type to be entered. In many cases, the client that is required for association may be of a number of different client types. Although, you could specify multiple rows one for each possible client type, with this setup, the client search from will pop up as many times as the number of rows that has been specified. This is not as efficient as it could be since the user may have to click many times to get to the client creation stage. We have removed the mandatory requirement for specifying a client type from this version onwards.

The left screenshot shows the 'Client Creation/Search Details' window. It has a 'Client category' dropdown menu which is circled in red. Below it are 'Client type', 'Client's role', and 'Associate's role' dropdowns. There are checkboxes for 'Allow search', 'Create a new client', and 'Allow start and end dates to be changed'. At the bottom are 'Save' and 'Exit' buttons.

The right screenshot shows the 'Edit Workflow Answer' window. It has tabs for 'General', 'Additional data', 'Profiles', 'Follow-up types', 'Clients', and 'Matters'. The 'Clients' tab is selected. It contains a table with columns 'Category/Type', 'Client's Role', and 'Associate's Role'. There are 'Search', 'Edit', and 'Create' buttons above the table. At the bottom are 'Inactive', 'Save', and 'Exit' buttons.

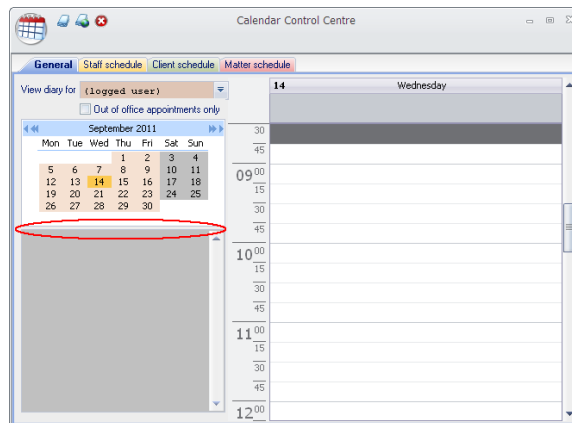
- The print feature for diary schedules were not working from the scheduling tab of the Calendar Control Centre. This is fixed.

The screenshot shows the 'Calendar Control Centre' window. It has tabs for 'General', 'Client schedule', and 'Matter schedule'. The 'Client schedule' tab is selected. It shows a calendar for August 2011 and a detailed view of a Thursday schedule. The 'Client' field is empty. The 'Add' and 'Replace' buttons are visible. The calendar shows dates from 1 to 31. The detailed view shows a Thursday schedule with times from 08:00 to 11:30.

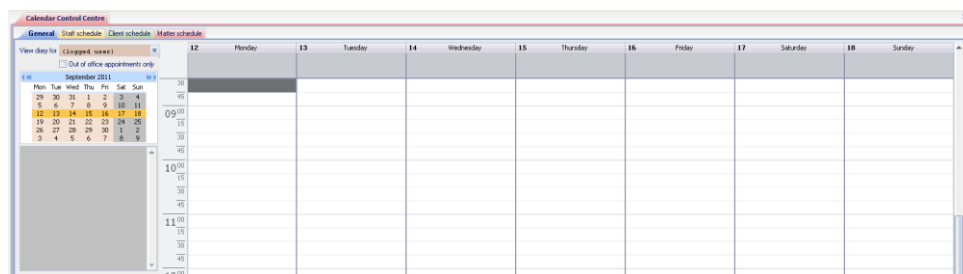
- We have added the ability to drag and drop email attachments or files from file system to the calendar edit form. The imported documents will be attached to the first primary client and the task in the list at the time of importation if there is one. When the save button is clicked, Synergy will attach the imported documents to all of the tasks, primary and related clients of the appointment. If a user clicks the exit button or the client and task lists become empty, then the document properties are not change and will remain as it was at the time of importation.

The screenshot shows the 'Add appointment' window. It has tabs for 'General', 'Attendees', 'Clients', 'Documents', 'Tasks', and 'Security'. The 'Documents' tab is selected. It shows a form with fields for 'Subject', 'Location', 'Category', 'Type', 'Start', 'End', 'Created by', 'Updated by', and 'Reminder'. There are 'Add' and 'Remove' buttons next to the 'Subject' field. At the bottom are 'Save' and 'Exit' buttons.

- ✚ We have removed the list box from the diary tabs since there was little use for it. With this list box removed, you should see faster load times for the diary appointments. The text box remains there and will display information as before.



- ✚ We have changed the week view of the calendar to be similar to outlook 2007 (in column format). We have also fixed the infinite loop that was occurring in week view mode.





***Modification as at release 09.03.05a***

- ✚ Synergy was preventing the trusted users from editing appointments from staff schedule and some other diary tab. This is fixed now.

## Modification as at release 09.03.05

- In some environments, there may be a requirement to have consistent matter descriptions that are completely different from the description of master matter. For example, in a sale environment, one may require a sales matter to be carrying the name of the product that is being sold as part of that process. This was not possible in the previous versions of Synergy. We have allowed to link library texts to matter types. When this is done, a drop down of the library text will be displayed in the matter edit form and then users can select entries from the drop down to use as matter description.

The left screenshot shows the 'Edit Matter Category' form. It has fields for 'External identifier', 'Description', 'Budgeted time', and 'Client association category to copy'. There are checkboxes for 'Warn users if there is no budget set', 'Target date is not mandatory', 'Add sequence number to description', 'Set sequence number', 'On creation, set users to be the logged user', and 'Overwrite the approver to logged user's default team'. A red circle highlights the 'Library text used for description' field. The right screenshot shows the 'Edit Workflow: 65 (In progress)' form. It has tabs for 'Summary', 'Production', 'Security', 'Approvers', and 'Notes'. The 'Summary' tab is active, showing fields for 'Client ID', 'Client name', 'Year', 'Workflow type', 'Description list' (highlighted with a red circle), 'Description', 'Date received', 'Target date', 'Importance', 'Responsibility', 'Secondary Resp', 'Approval by', 'Assigned by', 'Estimated fee', 'Dept/Partner', and 'Notes'. There are buttons for 'Approve', 'Save', and 'Exit'.

The description list in the matter edit form will have a blank entry at the top. When the form is loaded, the matter description is cached by the form. When the blank entry from the drop down is selected, the matter description will be reset to its initially cached value.

- We have added two new settings “**On creation, set users to be the logged user**” and “**Overwrite the approver to logged user’s default team**” for matter types. These settings will take precedence over the housekeeper settings when turned on.

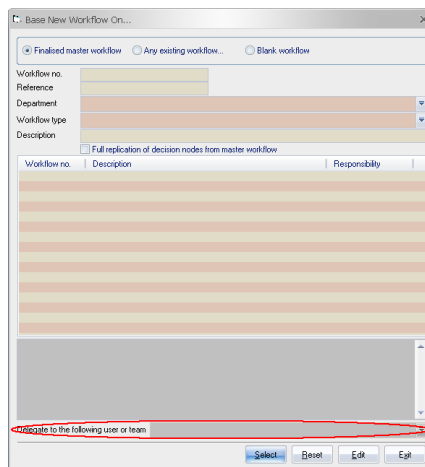
The screenshot shows the 'Edit Workflow Category' form. It has fields for 'External identifier', 'Description', 'Budgeted time', and 'Client association category to copy'. There are checkboxes for 'Warn users if there is no budget set', 'Target date is not mandatory', 'Add sequence number to description', 'Set sequence number', 'On creation, set users to be the logged user', and 'Overwrite the approver to logged user's default team'. Red circles highlight the 'On creation, set users to be the logged user' and 'Overwrite the approver to logged user's default team' checkboxes. The form also has fields for 'Invoice number details' and buttons for 'Inactive', 'Module Desc.', 'Save', and 'Exit'.

When “**On creation, set users to be the logged user**” option is turned on, all 4 users for the new matters will be set to the logged user, that is, the users are not inherited from the master. With this setting in place, setting the client at the matter edit form will not change the responsible user.

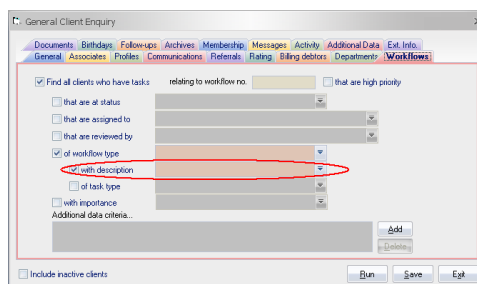
When “**Overwrite the approver to logged user’s default team**” option is turned on, the system will set the approver of the matter to be the default team for the logged user if one is set up. If the logged user does not have a default team, the approver will remain as the logged user. In setting the approver, if there are other approvers for the matters (the approver list has other entries) the user’s default team will be added to the list if it is not already in the list.

Please note that second option cannot be used on its own. It will only be available if the first option is turned on. Remember that this is a matter creation option. Once the matter is created, the rest of the process will follow as before.

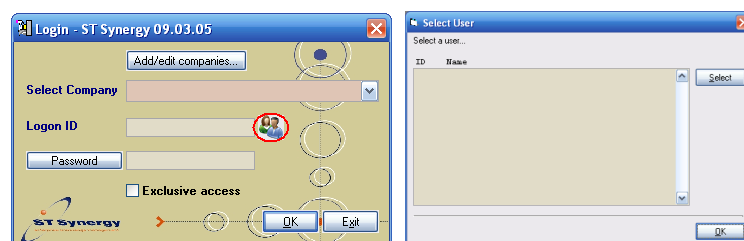
The delegated to drop down in the master matter selection form will be disabled when users select a master matter that have “**On creation, set users to be the logged user**” option is turned on because the tasks will be delegated to the logged user.



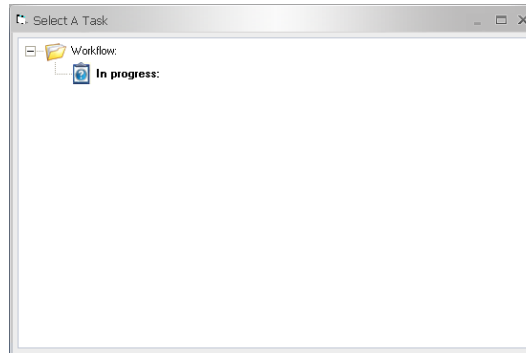
We have also added this library text to the matters tab of the General Client Enquiry form.



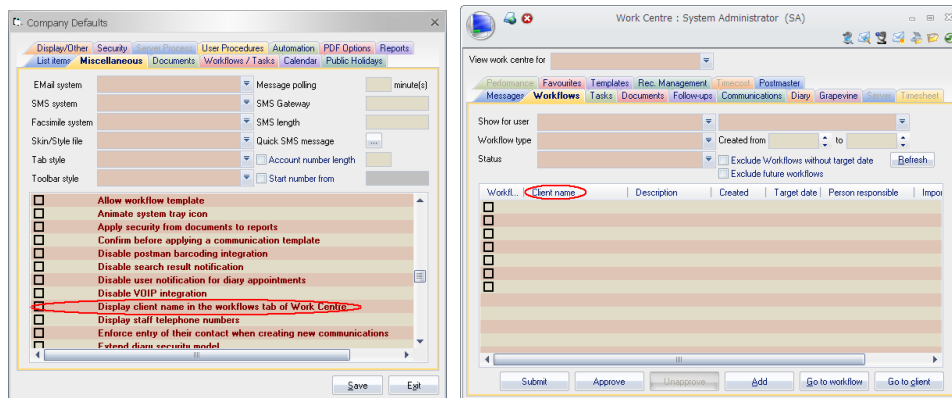
When using logon identifier to log into synergy, sometimes users may want to logon as a different user but may not know the exact logon id. We have placed a button that allows users to select a user from a list for logging into Synergy.



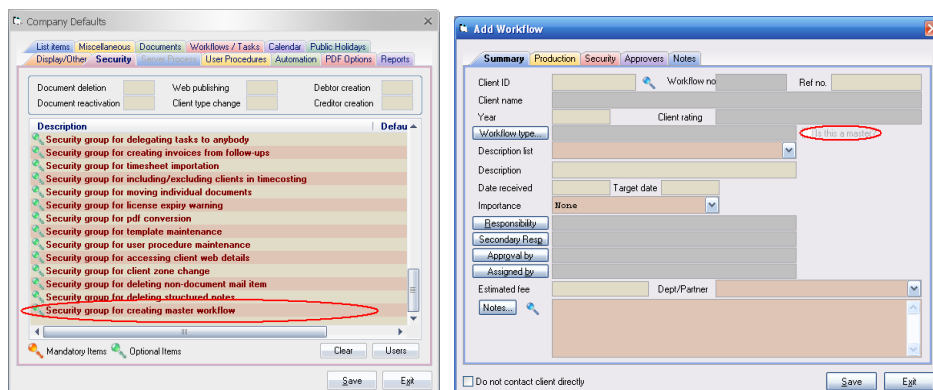
- When creating matters from some forms (eg task tab of a communication and a few other places), after the creation of the matter, the user is prompted to select a task. In cases where the matter has only one task, this is unnecessary. We have changed the process so that in these cases, the form automatically returns the single task to the caller.



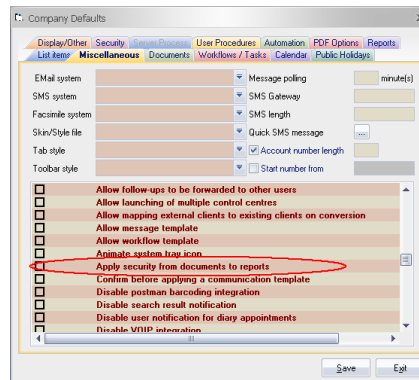
- We have added a new setting to the company defaults to allow client names to be displayed in the matters tab of the work centre. Please note that when this option is turned on the text box below the list will be made invisible.



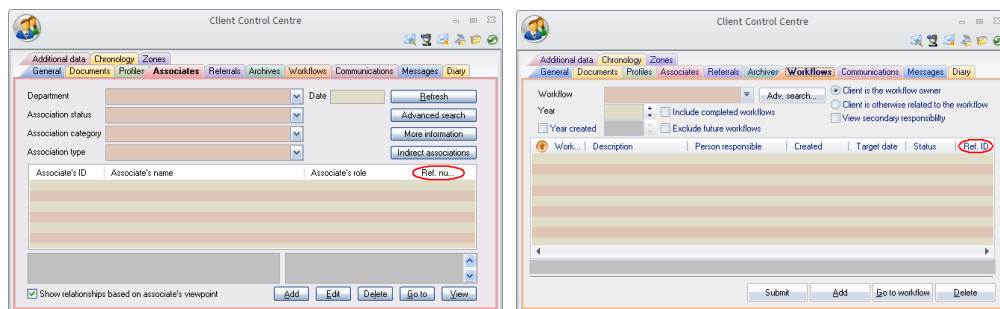
- Creation of master matters and deletion of matters were using the same access level setting. In some cases, users may want to relax the matter deletion but need tighter control as to who can create master matters. In this version, we have added a new security group that allows system administrators to specify which users in the organisation can create master matter. The absence of this security group will make the system behave as before. When this security group is set and there are users attached to the security group, only those people will be able to create master matters.



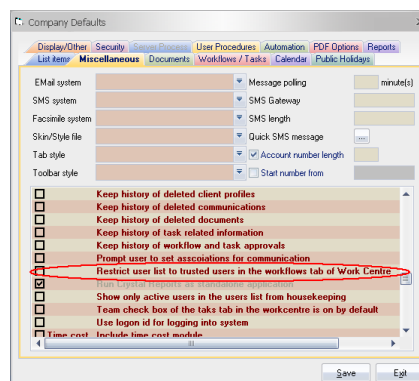
- In previous versions of Synergy, user define reports did not have any security attached to it. The only security was the access level defined when the report was being created. In this version we have added a setting to the company defaults that allows the user defined to use the security setting of the underlying report document. When this option is turned on, only users that pass the security setting of the report document can run the report.



- We are now displaying the client's reference in the associate tab of the client control centre. We have also moved the reference number before the PCT column in the matters tab.



- The users list in the matters tab of the work centre was displaying all users. We have placed a setting in the company defaults that allows administrators to restrict this list to the list of trusted users.

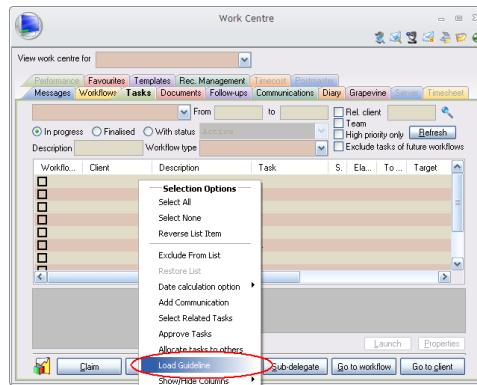


- We have added a new option to the pop-up menu of the list in the task tab of the work centre to allow loading of guidelines from tasks and matters. When requested:

- Selected task has a single guideline, the guideline will be loaded.
- Selected task has multiple guidelines; the user has to select one to load.

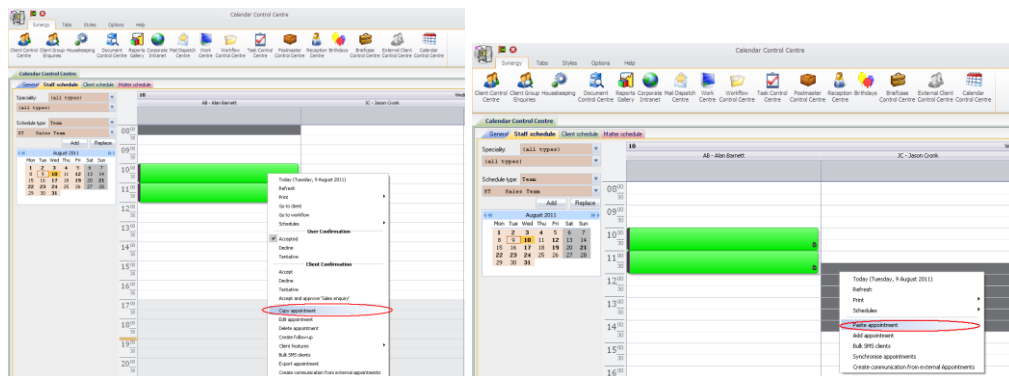
- Selected task has no guidelines; guidelines from other tasks will be displayed and will follow the same two rules above.

If you do not have a specific preference as to which task the guideline should be attached to, we recommend attaching all of the guidelines to the first task. This way, any of them can be loaded at any point during the life a workflow. We have also moved the client name column to be next to the matter number.



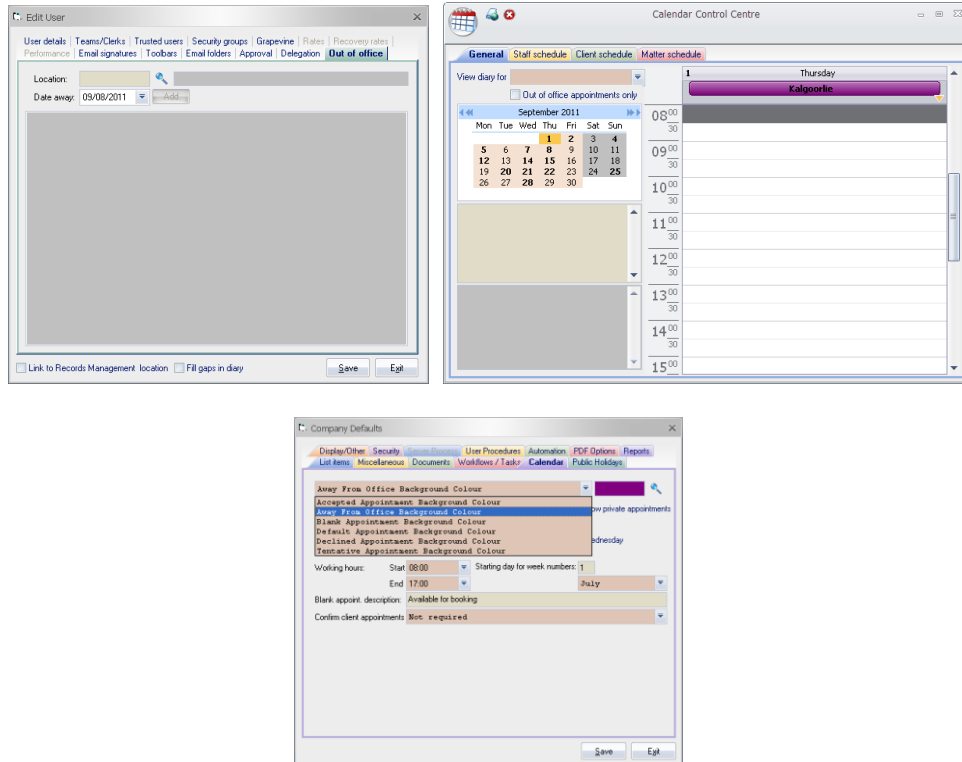
- Added occupation and occupation code to the prospect form since prospects are 99% of times people.

- We have allowed a copy and paste operation in the “Staff schedule” of the calendar control centre. Users can copy an appointment from one staff’s schedule by highlighting the appointment and selecting the copy menu option. To paste this appointment, user needs to highlight a time slot in another user’s schedule and then using the menu option paste it there. The paste operation will create a duplicate of the appointment by replacing the user that appointment was copied from with the user that the appointment is pasted to.





In diary centric organisation (like doctor's surgeries), sometime the users appointments are in different offices around the country. Although this can be achieved by setting the location field of an appointment, sometime a better visual cue is needed to highlight the fact that a particular user is away. Various offices can be defined as location clients for example. We have allowed administrators to store a set of dates against the user profile and link these dates to clients. We do not restrict the type of client that these dates can be linked to but this feature is only meant to be used with location type clients. Once this is set, **"General"** and **"Staff schedule"** tabs of the calendar control centre will display the location at the top of the calendar for the staff. The colour for these can be defined from the company defaults, calendar tab.



Added support for multiple monitors. Synergy will now detect multiple monitors and load the forms on the monitor that the main application is located.

### *Modification as at release 09.03.04*



In a few versions back, we introduced the ability to create workflow when creating new appointments. In this version, we have allowed the target date of the new matter to be set based on the date of the appointment.

Negative values in the target days field will set the target date the specified number of days before the appointment. Positive values will set the target date the specified number of days after the appointment. Setting target date to zero will allow the system to use other exiting settings for calculation of matter target date.

When the appointment type is configured to set the matter target date, target date of matters are calculated when they are created from the appointment for the first time. Additionally, when the dates of these appointments are amended, Synergy will amend the matter target date when the following conditions are met:

- 1) There is a single active matter linked to the appointment.
- 2) If the appointment is a recurring appointment, the the user is only operating on a single recurrence instance.
- 3) The newly calculated target date will have to be in the future.

When the above conditions are met, Synergy will alter the matter target date and then enable the user to approve the currently active or on-hold task for the matter. This will only be done if the task is a decision. For normal task, task approval process will not occur.

We have also allowed the appointment details to be defaulted to a library text. Users can specify the default library text for each appointment type. Please note that when selecting an appointment type in the appointment creation form, if a library text is linked to appointment type, then the library text will be appended to the content of the note at the current insertion point.



For each matter, we have a check box in the matter edit form that allows users to indicate that the client of the matter should not be contacted directly. This is indicated in the Matter Control Centre and task edit form. We have extended this to display in the edit appointment form as well.

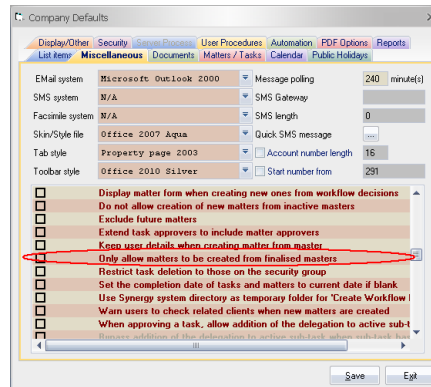
We have added a new check box to the options tab of the toolbar “**Session Counts**” that allows users to turn the active session counts displayed in the status bar on/off.

We have also placed a setting in the company defaults form to allow administrators to define the default checked status of this option. This can be found in the miscellaneous tab of the company default form under other settings.

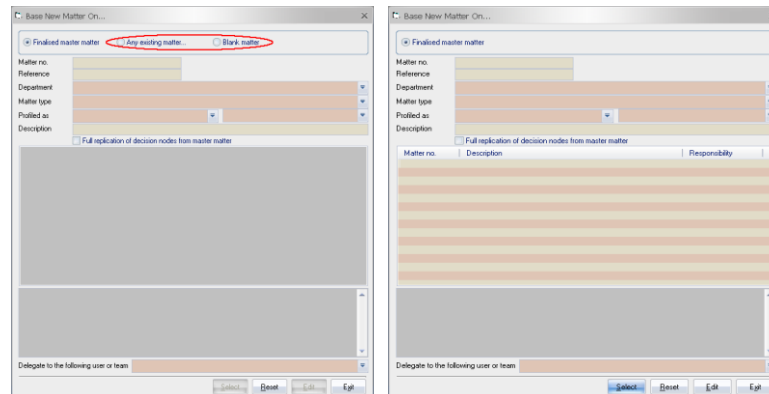
We have added a new button to the company tab of the housekeeping form to allow administrators to clean up the historical user login records. This would assist to optimise the system operation if these records are reduced to a manageable number.

Many organisations may want to allow matters to be created from finalised masters only. When the master matter selection form is displayed, there are two other radio

buttons that allow users to create a matter based on other matters or even create a blank matter without any tasks. To disable this for normal users, we have placed a setting in the company defaults.



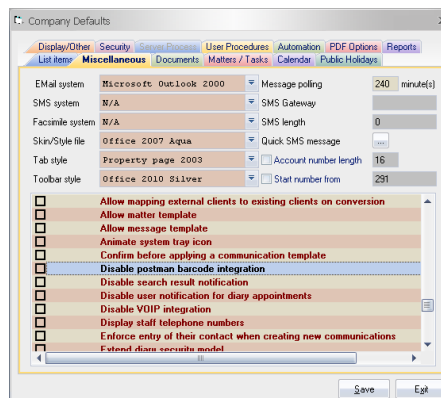
With this option turned off the master matter selection from will display the other two radio buttons. When this option is turned on, the two radio buttons are disabled and the matter type drop down will default to the first entry.



Please note that those users with housekeeper access level are exempt from this restriction.

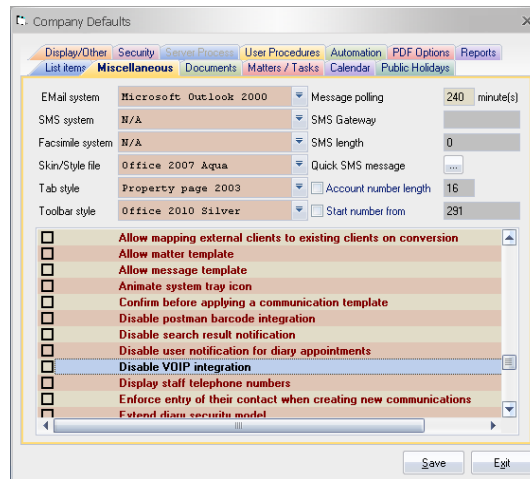


As you may be aware, Synergy has been integrated with Postman address barcode software for over 7 years. In previous versions, Synergy was trying to auto-detect whether the postman product was installed on a PC the first time the postman features were required. Given that many of our customers do not use this product, we have placed a setting in the company default to disable this automated detection for these customers.

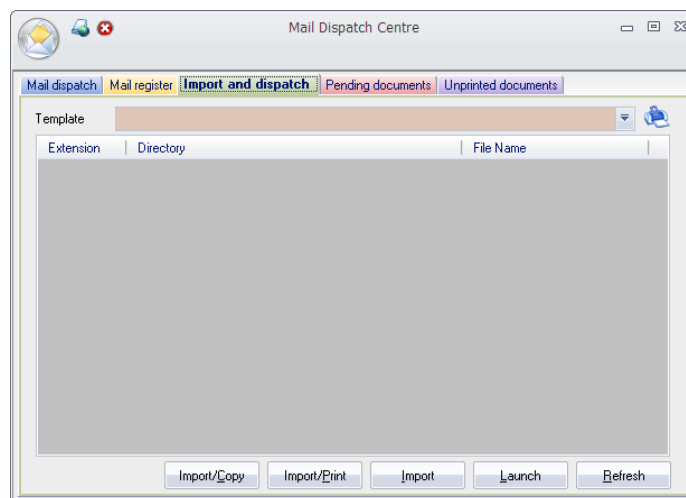




Synergy has been integrated with some VOIP systems like Skype. Synergy will try to auto-detect whether Skype is installed and can be initialised on a PC. Given that a handful of our customers are using our VOIP integration, we have placed a setting in the company defaults to disable the VOIP integration in Synergy. Once disabled, the VOIP features of the application will be disabled. Hopefully, disabling these features will optimise the login process slightly.

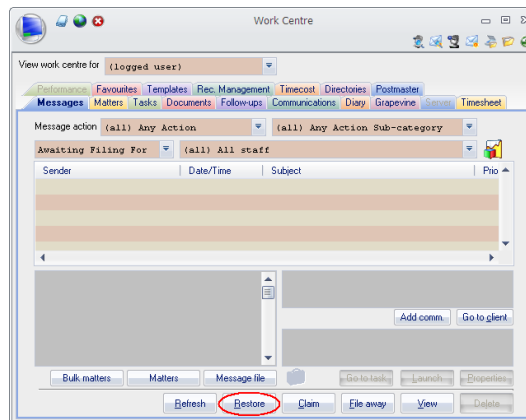


Added an “**Import/Copy**” button to the import and dispatch tab of the Mail Dispatch Centre. This button is functionally identical to the import and print with one difference. Instead of printing the document after the importation, it copies the file to a folder in the application’s working directory (**CXXXXXXX\YYYYYY** where **XXXXXXX** is the identification of the company in the start up database and **YYYYYY** is the user identifier of the currently logged user). The folder will be named as **YYYYMMDD\_SSSSS**. The first part of the folder name will be the current date. The SSSS is a sequential number signifying the current run of this process. This number starts from 00001 and could go as high as 99999 depending on how many times this process has run by the logged user on a given date.

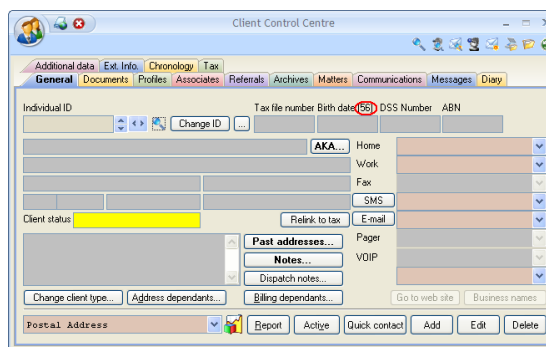


Added a “**Restore**” button to the messages tab of the Work Centre “filing clerk” option. Sometime filing clerks hit the file away button by mistake and the message gets taken away from the list. It would be hard to restore these messages to the filing clerk list so that they can actually do the work. When this button is clicked, the filing clerk will be allowed to specify how far back s/he wants to look at by specifying the date that s/he has file away the required messages. Once the date is entered, a list of

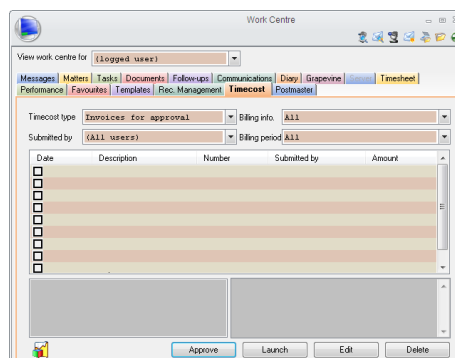
filing clerk messages that have been file away by the user will be displayed. The user can select multiple messages and once the selection is done, all these messages will be restored as if they were never processed. The filing clerk does not need to claim them since only messages claimed by the filing clerk will be displayed.



- When the date of birth is displayed for a client in the Client Control Centre, the system now displays the person's age in the label field inside brackets.

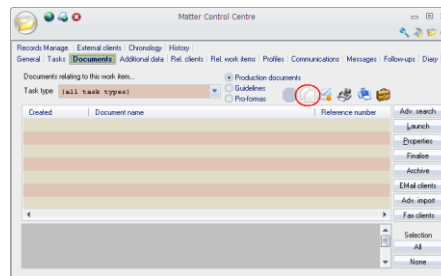


- We have converted the invoice list in the timecost tab of the Work Centre to multi-select list for "Invoices for approval" option. The user can select multiple invoices and approve them all in one process. Please note that the invoice approval will be done one record at a time and errors caused for each invoice will be reported individually.

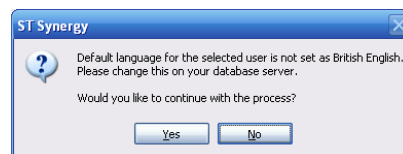


- When importing emails to a task, the message was being linked to the task but the MSG file was not. We have fixed this from this version onwards and have linked the MSG file to the same task that message is linked to.
- Added a new copy button to the documents tab of the Matter Control Centre. This will provide the copy facility of any document that is listed in the list box. Please

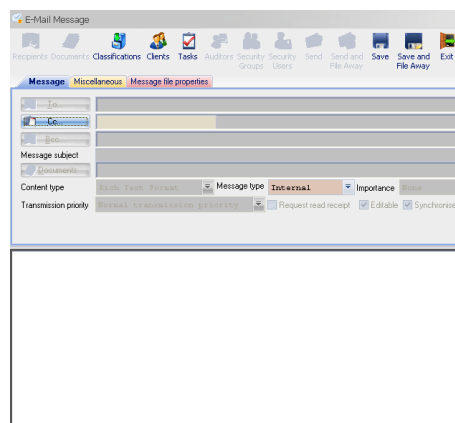
note that the user will be in full control of which task and client the document should be attached to.



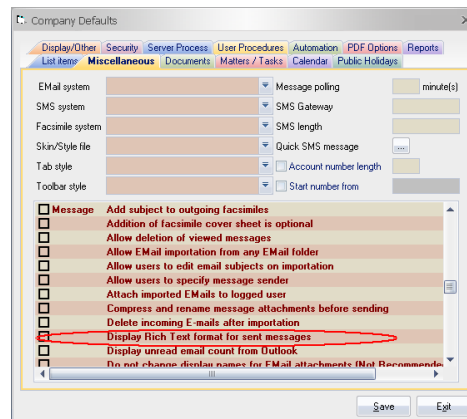
- When adding, upgrading or editing SQL Server databases from Add/Edit Company form, Synergy will now check the default language for the login that is entered in the form. The following warning message will be displayed if the language is not set to British English. The user will be given the option to stop the process or continue.



- Added a new tab style and two new skins. Please ensure that the new skin file is copied from the installation package to your skins and styles folder.
- In some rare cases, clicking buttons were not responding and performing the required tasks. This would have occurred when people click on a blank area of a tab page. This was due to a bug in one of the components that Synergy was using. Our vendors have fixed this bug and from this version onwards, all of the buttons should be responsive in all cases.
- When time cost entries are created for the appointments, we now append the subject of the appointment to the description of the time cost entry. We also set the comments of the time cost entry to be identical to the comments from the appointment. Please note that this is done when time cost entries are created. Subsequent updating of the subject line and comments will not be reflected on the existing time cost entries because a user may have already updated these fields manually.
- When sent messages are viewed in Synergy, only unformatted version of the message used to be displayed. This would have made it hard if the email was a Rich Text email containing images and other things. In this version, all Rich Text emails that are sent will be display in a standard RTF control. This will provide ability to see images and other useful content.

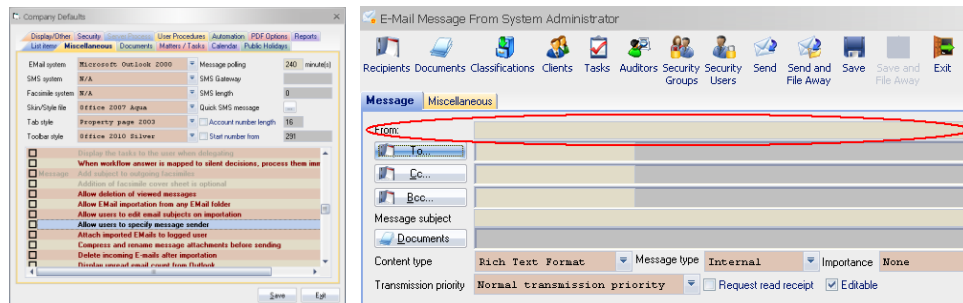


This feature can be turned on/off from the company defaults in housekeeping using the following option.

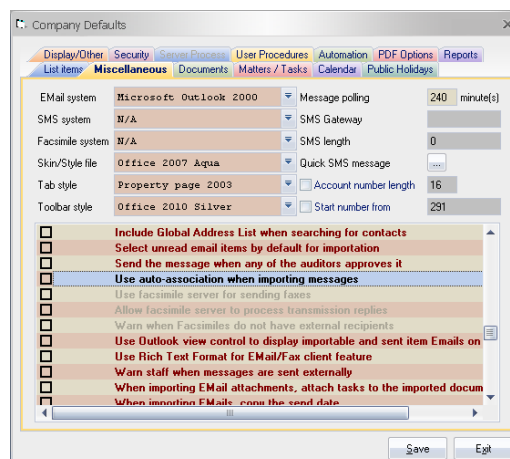


## Modification as at release 09.03.03

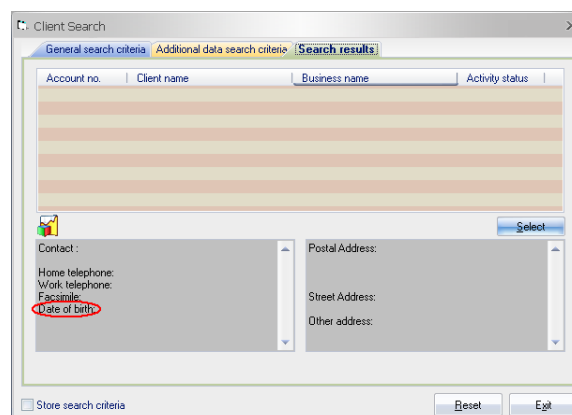
- Added a setting to the housekeeping to enable users to specify sender of an Email. Please make sure that you enter mail boxes that are valid in your Exchange server. No validation is done on the data entered in this field. It is used as the sender of the email as entered. Consequently, invalid data might cause emails to fail.



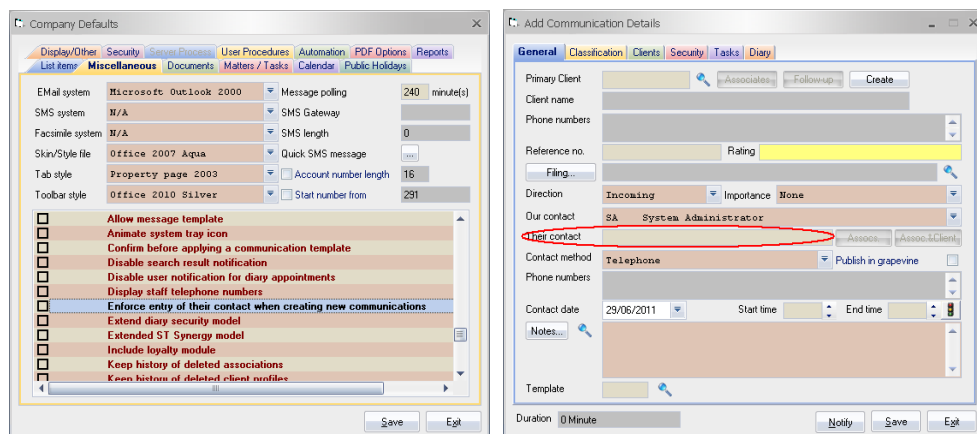
- When auto-association is configured at the client type level for messages, sometimes users may not want this to happen for imported messages. To allow sites to do this, we have added a setting in the housekeeping company defaults that can be used to do this. The default is set to false to preserve previous behaviour. To allow the application to look at the client type auto-association setting when importing messages, turn this configuration on.



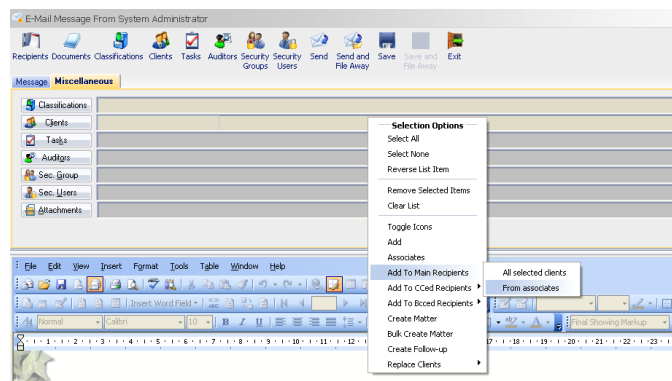
- Added date of birth to the information displayed in the results tab of the client search form.



- Added matter identifier to the task hold history table for optimising calculation of hold days for a matter. Changed the calculation of business day calculation to use the new matter identifier for calculating the total hold days for a matter.
- Separated the public holidays from the rest of the calendar configuration table. If you have developed reports relying on the public holidays in the ZZCALCON table, you need to change these report to use ZZPUBHLD.
- Some controls centres can be maximised. However, when these control centres are maximised and then user clicks on other control centres and come back to the maximised control centre, it was restoring the maximised control centre to its original size. From this version, maximise state of a control centre is remembered and restored as required.
- Added a setting to the company defaults that will blank out the “Their contact” field when creating a new communication. This will be useful when communications are linked to a client but the actual person that is being spoken to is someone else most of the time. Please note that this is only done when loading the communication form initially for in add mode. Once the form is loaded, their contact field will be populated using the normal business rules (i.e. changing of client or using associates button).



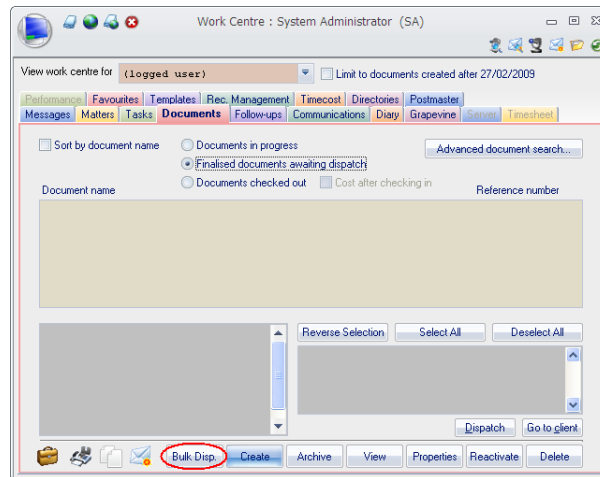
- In some cases, users may want to select associates of client as the recipients of emails. This was achievable by placing the associate in the client list and then adding it to the relevant recipient list. However, in some cases, users may not want to link the email to the associate. We have added a new popup menu option that will combine all of these operations into one. By selecting “From associates” popup menu option, a list of associates will be displayed allowing the user to select those required. Once the selection is done, those associates that have an email address will be added to the requested list. Please note that the associate will not be added to the client list in this process.





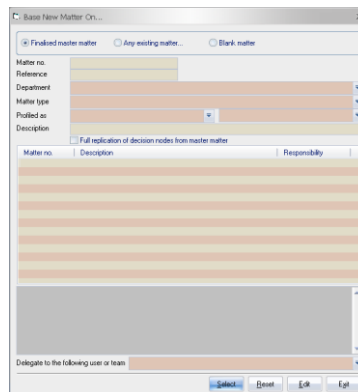


We have added a bulk dispatch button to the documents tab of the Work Centre to allow bulk dispatching of documents. This button is only available when “Finalised documents awaiting dispatch” option is selected. Users can tick those documents that they want to dispatch and then click this new button. Synergy will, then, dispatch the document to all of the primary clients of the document. Please note that all clients that a document is dispatched to will be ignored.

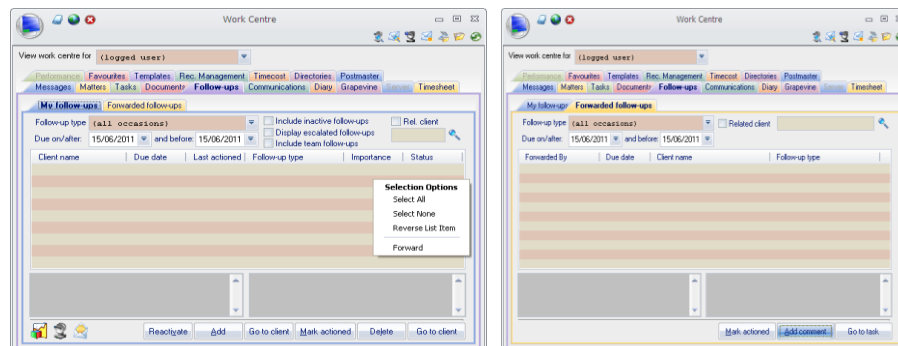


## Modification as at release 09.03.02

- Changed the list box in the master matter selection form to a sortable list view. Also widened the list and the matter description column.



- Added ability to forward follow-ups to other users and teams. This facility allows a user to forward a follow-up to other users to work on. The user can add comment and when the work is complete, mark the forward as actioned. We have added a tab to the follow-up tab of the Work Centre to cater for separation of normal follow-ups from forwarded follow-ups. “My follow-ups” tab will be identical to the follow-up tab in previous versions with the identical facilities.



We have added a status to the follow-up list in the Work Centre to display a status of the follow-ups. When the follow-up is forwarded, the status will be displayed as “Waiting” since no-one has worked on it. The status will be displayed as “Completed” when all forwarded users mark their forward as complete. When there are a mix of completed and incomplete forward, “Partially done” will be displayed to signify that some people have completed the work while other have not. The “Forwarded follow-ups” will display all forwarded follow-ups for a user as well as all of the teams that s/he is a member of.

### Adding Comments:

Users can add comments to forwarded follow-ups. If a follow-up is forwarded to the user only, then the comment will be added to that forward only.

When follow-ups have been forwarded to teams only, adding comments will provide a list of teams for user to select from. If the user does not select any teams, nothing will be done. If the user selects one team, then the forward for that team will be claimed for this user automatically and the comments will be added to the record. If user selects multiple teams, the forward for the first selected team will be claimed for the user and comments will be added to it. Forwarded follow-up for other selected

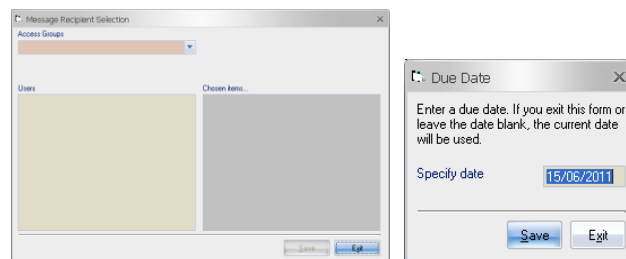
teams will be automatically actioned since this user is working on behalf of all of those teams.

### Marking Actioned:

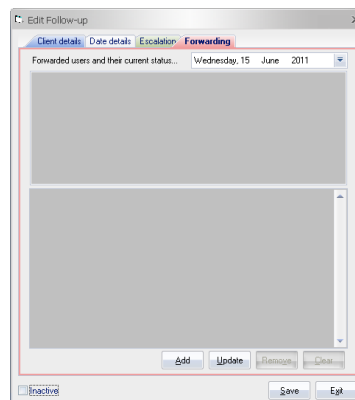
Users can mark forwarded follow-ups as actioned. If a follow-up is forwarded to that user only, then that forward will be marked as actioned. If the follow-up is forwarded to teams only, then the user must select a team from the list. If the follow-up is forwarded to a user and teams, then the user's own forward will always be marked as actioned. Whether the team based forwarded is marked as actioned depends on whether the user selects them for actioning.

### Forwarding follow-ups:

There are two methods for forwarding the follow-ups. The first method is using the pop-up menu from the "My follow-ups" tab of the Work Centre as indicated in the above image. To use this method, tick the follow-ups that you want to forward from the list and then select the forward from the pop-up menu. You will be prompted to select the list of users and teams that you would like to forward. Once the list is selected, you will be prompted to specify a due date for the forwards (default will be the current date). Once the due date is selected, then all selected follow-ups will be forwarded to all of the selected users.



The second method is editing each individual follow-up and using the new "Forwarding" tab to add the users as displayed below. Please note that you will not be able to alter the details of completed forwards, neither will you be able to delete these forwards once they are marked actioned.

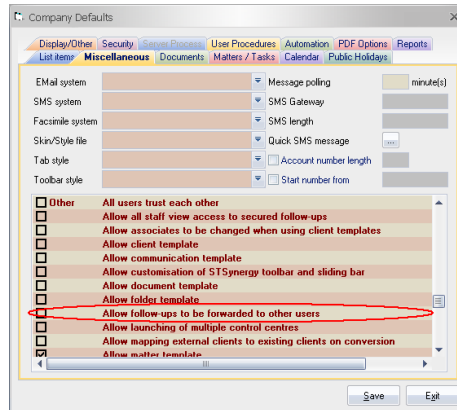


We have also separated the forwarded follow-ups from the normal follow-ups in the shortcut bar.

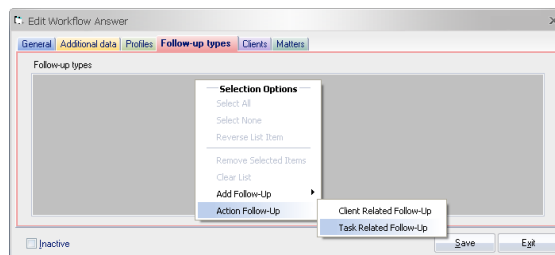


Software Development Kit has been amended to allow forwarding of follow-ups when they are created for clients.

This feature can be turned on/off from the company defaults.

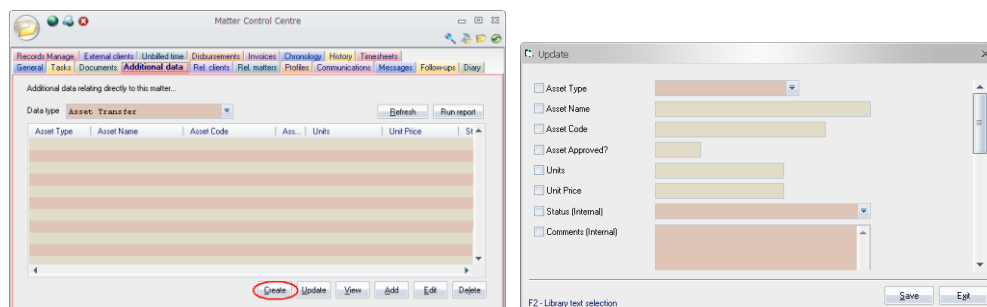


- Added ability mark follow-ups actioned during decision process. This can be set from the answer form in the housekeeping.



When selected, the task or client related follow-ups will be displayed to the user and the user can mark them actioned as s/he wishes to.

- We have added a create button to the additional data tab of the Matter Control Centre. This button allows users to create a new matter in a manner similar to the copy document. Once the new matter is created, a copy of the selected additional data rows will be added to the new matter. The user will have to specify which columns need to be copied using the additional data form.

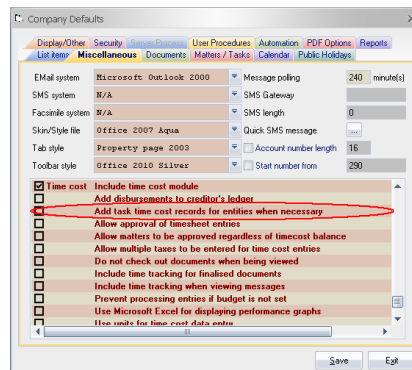


Please note that the following conditions must be met before the process continues:

- 1) Matter type must be linked to the additional data type.
- 2) User must have access to create the additional data type.
- 3) User must select additional data rows from the list.
- 4) User must specify at least one additional data column for the copy process.



In some cases, sites may only be interested in tracking the time cost entries for tasks. In this case, the time tracking will only be turned on for tasks and will be turned off for all other entity types such as communication, documents etc. In this situation, the task tracking allows Synergy to create a time record when users are in the task edit form. However, there are numerous occasions where communication, documents etc. are created outside the task form and linked to tasks. In previous versions, there would be no time recorded in these cases. From this version, we have introduced a new setting in the company defaults that enforces the creation of time cost records in these cases against the task that these entities are linked.

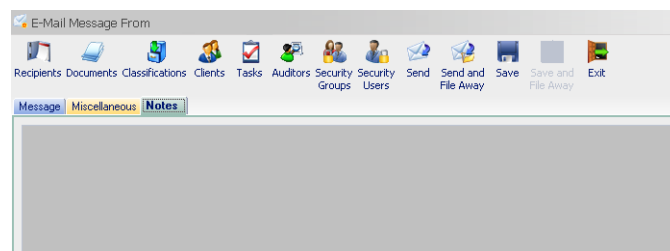


With this setting on, when a communication is created and linked to a task, Synergy will create a time record in the system for this entity despite the fact that the communication time tracking is turned off. For this to work, the following two conditions must be satisfied:

- 1) Task tracking must be turned on,
- 2) And the entity must be linked to a task.



In previous versions, we introduced a feature where creation of diary appointment will allow sending of a confirmation email immediately. In these cases, a user may have typed some information in the body of the appointment that may be useful when the confirmation email is being composed. In this scenario, it is also possible to prompt for creation of a communication and perhaps the conversation recorded in the communication may have information that could be useful when the confirmation message is being composed. To cater for this, we have added a “Notes” tab to the message edit form that will display these notes.

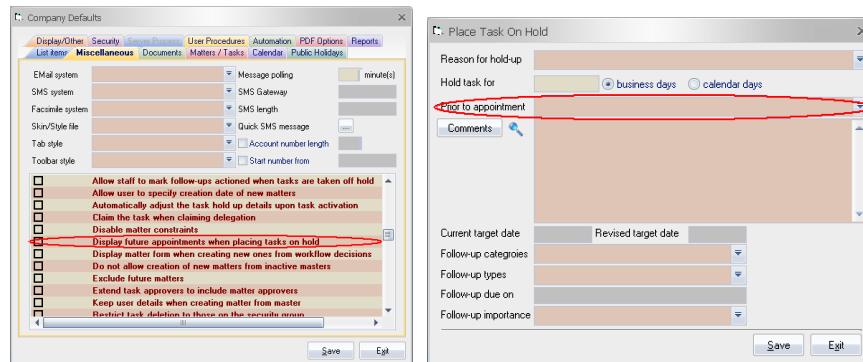


When we introduced the ability to host Outlook email in Synergy, message RTF files were not being saved in RTF format. These messages were being saved in the default Microsoft word format. This bug is fixed on this release.

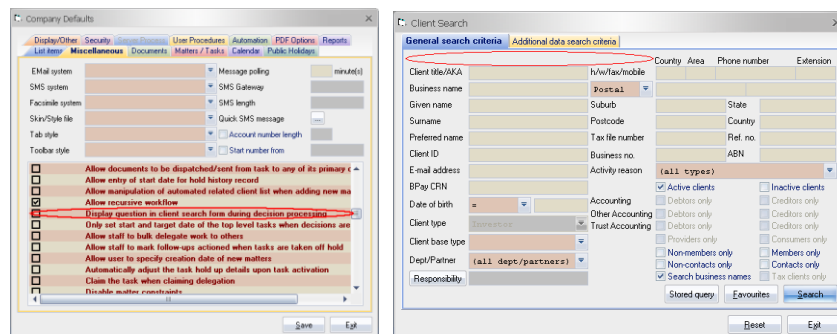


In appointment centric organisations, users may want to use the date of appointments for placing tasks on holds. In previous versions, user would have to work this out separately before they place a task on hold. We have introduced a setting that allows Synergy to display a dropdown of future appointments in the put on hold form and

allow users to select an appointment for the calculation of the task target date and the follow-up date. The calculation is based on the specified number of days before the appointment date. This feature can be turned on/off from company defaults.



Processing work flow may prompt a user form creation of association. In many cases, number of associations may need to be created. Synergy provides facility to search for client during this process. Despite setting the client type in the search form, the user may forget what association type is being created when the client search form is displayed. We have introduced a setting that allows sites to specify that the description of the question to be displayed in the client search form. With this setting, a red label at the top of the client search form will display the question being processed.



We have changed the loading behaviour of the task edit form. In previous versions, all tabs in this form were filled in during the initial display. From this version onwards, the following tabs will be filled in when they are clicked for the first time.

Communications, Chronology, Diary, Structured notes, Non-document mail items, Guidelines, Proforma documents, Messages, Clients, Follow-ups

This will assist spreading the loading process.

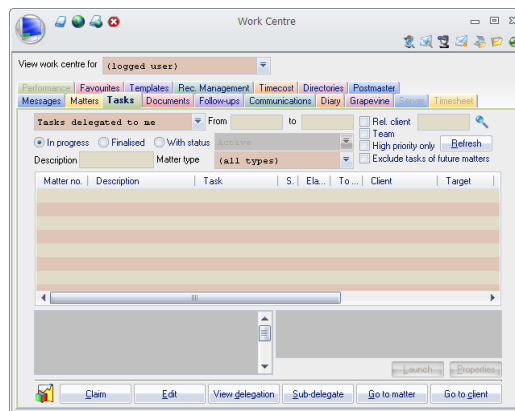


✚ We have also optimised Matter and Client Control Centre ribbon bars to have less data extraction statements.

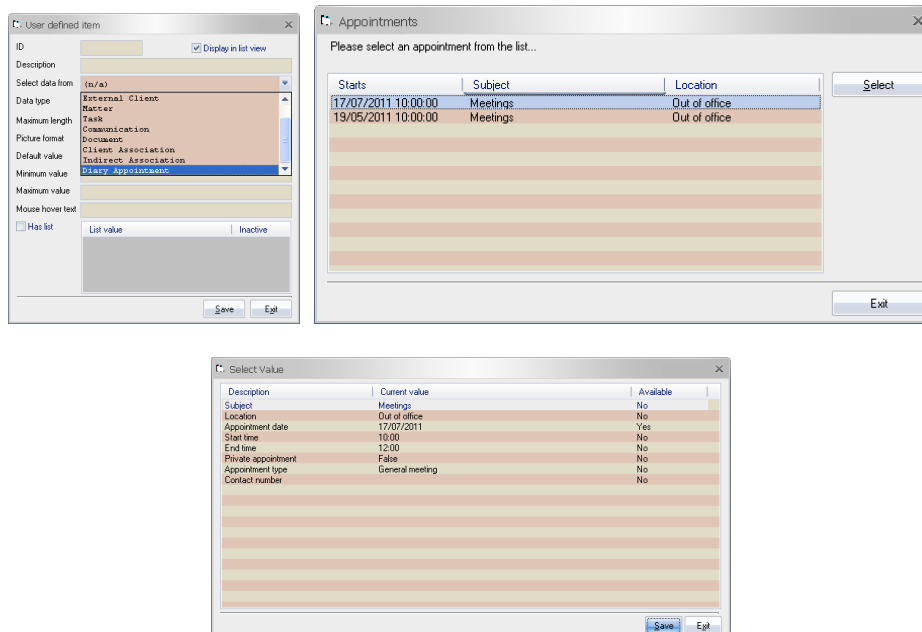
✚ In the task tab of the work centre, we have changed the refresh behaviour of the list. When a user performs the following processes, only the entries that are processed will be refreshed:

- 1) Using the “View delegation” button,
- 2) Using the “Edit” button,
- 3) Using the “Claim” button,
- 4) Using the “Sub-delegate” button,
- 5) Using “Change delegation” from the pop-up menu.

Please note that when multi-select are allowed and you select all of the entries in the list, you will not get any benefits from this change because in essence the entire list has to be refreshed again any way.

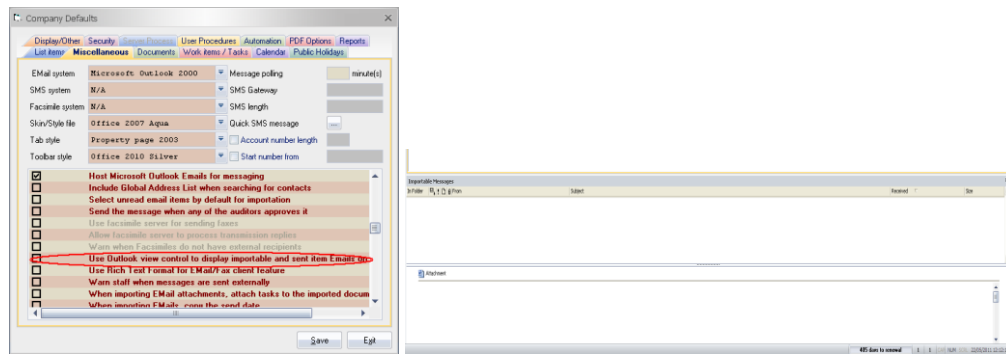


✚ Allowed additional data items to be based on diary appointments. When used, the additional data form will allow selection of information from appointments. The form will default to the closest appointment to the current date if exists in add mode. Please note that if additional data is a date field, the appointment date will be returned once an appointment is selected from the list. However, other data types will display the usual information form and will allow user to select the desired information.

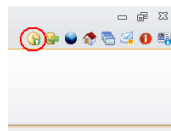


### Modification as at release 09.03.01

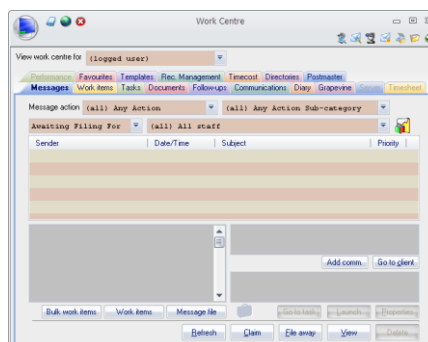
- Added a setting to allow sites to use the Microsoft Outlook Viewer ActiveX control in the email desktop. This control is a standard ActiveX control that is installed as part of installation of Microsoft Outlook. Using this control will allow emails to load much faster than the grid control that was being used in the previous versions. Please note that being an Outlook control; you may receive the Outlook Security Guard message when this control is used since Synergy cannot alter the behaviour of this ActiveX control. User can still be able to drag and drop emails from this control.



- Microsoft has changed the shutdown behaviour of Microsoft Outlook. From Outlook 2007 onwards, when Outlook is closed, the Outlook process completely terminates. This is a drastic change from previous versions. With this change forced on software vendors, there is no choice but to allow an approach for reconnecting the software to Outlook. We have added a new icon on the top right side of the Synergy ribbon bar. This icon will be made visible when Synergy is disconnected from outlook. In those cases, the users can simply click this icon to reconnect Synergy to their Outlook.



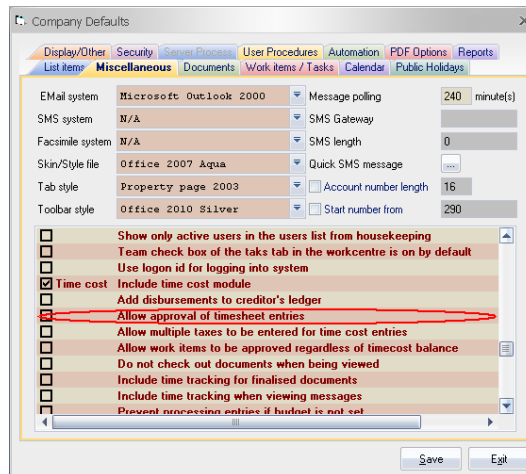
- In previous versions, administrators were allowed to set teams as filing clerks for other users. However, to get the messages sent to a filing team, someone had to logon to Synergy with the team's user name and password and this is not allowed in Synergy. We have amended the "Awaiting for filing" option in the messages tab of the Workcentre. From this version, all messages sent to filing teams will be displayed for all members of that team and can only be worked on by one member of the team. The member can explicitly claim the messages or when they start working on the message, Synergy will automatically claim the message for them. Once claimed, the message will be removed from the other members of the team.



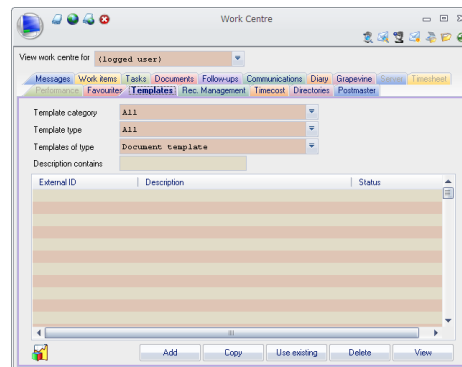




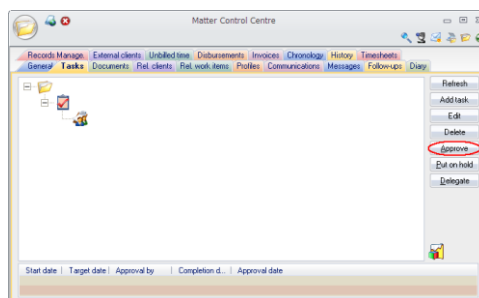
In some cases, the users may want to turn time costing on to keep track of time for various activities. However, they may not want to go through full invoicing in Synergy. We have added a new option to enable/disable the approval of timesheet entries. Without this option, users may approve a timesheet entry by mistake. In this case, the task that the timesheet entry is costed to cannot be deleted at all which may not be desirable.



Allowed documents and emails to be dragged and dropped to the templates list of the Workcentre. Only document and message templates will be allowed for this operation. Files and email attachments can only be dropped on a document template and email can only be dropped on a message template. When if the user can drop the dragged items on the list entry under the mouse, the list item will automatically be selected indicating that user can drop the items. Please note that for Emails, only filing classifications, security groups, and security users will be copied to the imported messages.



Allowed approval of tasks and matters from the task tab of the Matter Control Centre.





Added a description field to the master matter selection form further assist in filtering the matters.

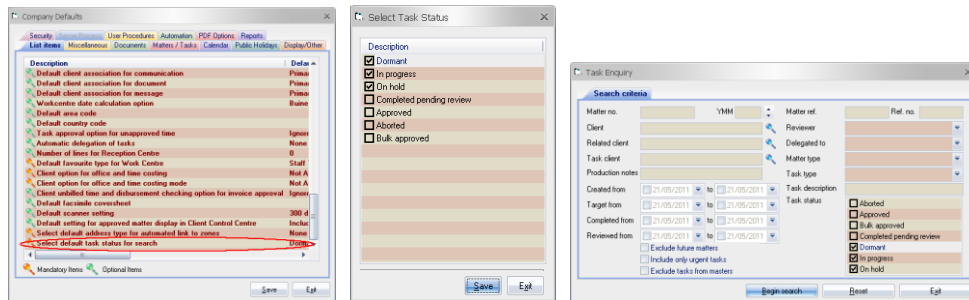


Added ability to optionally link non-document mail items to tasks. Please note that the non-document mail items should not be deleted as they represent the items that have been sent to clients. To prevent these items from accidental deletion, we have added a security group. When this security group is set up, only people within this security group can delete non-document mail items. In the absence of this security group, everyone can delete them similar to the way system behaved before.

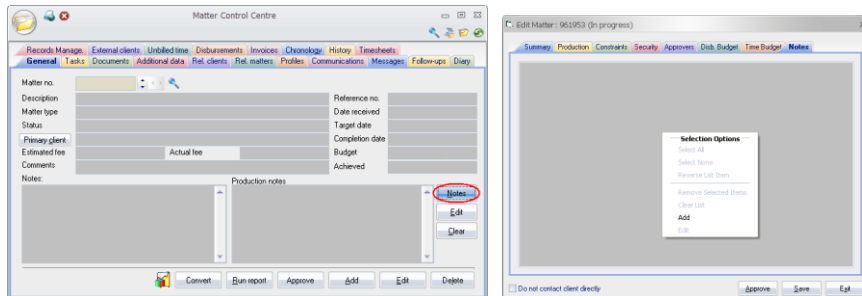


Added ability to filter tasks in the Workcentre by matter type and description. Also allowed full external and internal drag and drop to the task tab of the Workcentre. As user drags the items over the task list, the entry under the mouse will be highlighted. When the user drops the dragged items, these items will be imported and linked to the highlighted task.

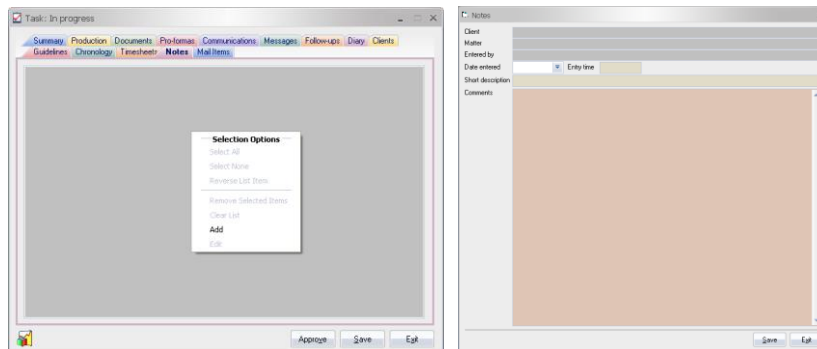
- ✚ We have added a setting to the company default allowing sites to specify the default task status for the task search form.



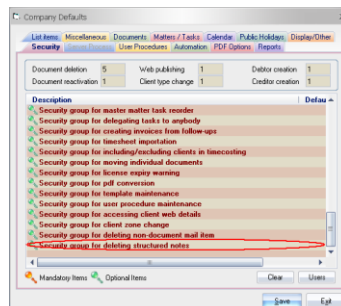
- ✚ We have added a new table for storing structured notes for matters and tasks. These structured notes will keep track who and when the note has been added to the matter or task. For matters, these notes can be added or modified from the general tab of the Matter Control Centre or the new “Notes” tab of the matter edit form.



For tasks, the only way to add structured notes is from the task edit form.

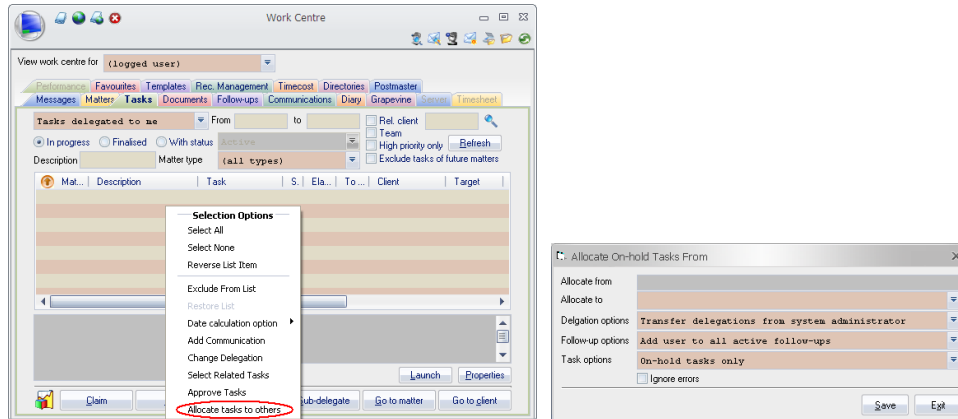


We have added a security group that specifies who can delete these structured notes. In presence of this group, only users in this group can delete the notes. In the absence of this group, only creator of the note can delete it.

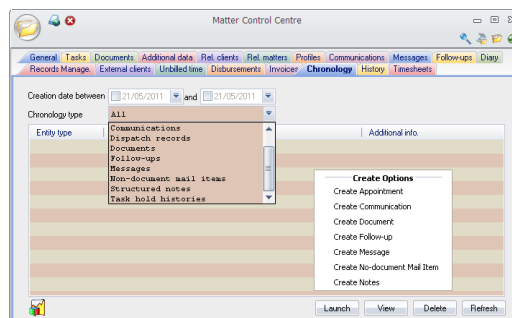




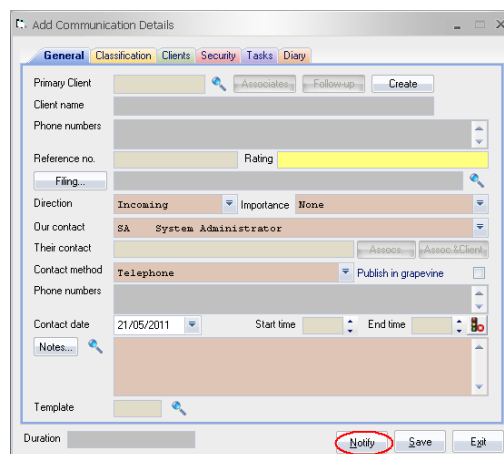
Added ability to allocate tasks from one user to another user from the task tab of the Workcentre. This could be used by the user to allocate work to others when they will be on leave or absence from the office. Users can specify how the delegations and follow-ups should be handled. In addition to that, the users can specify whether active or on-hold or tasks with both status should be processed.



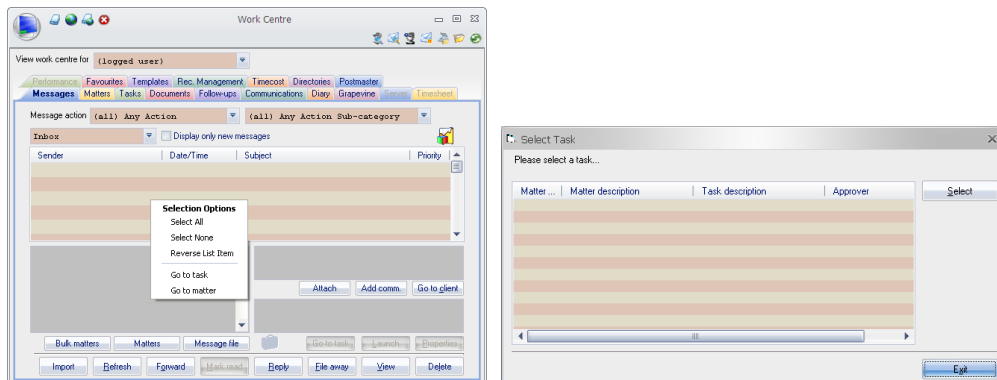
The chronology list has been extended to include a number of other entities as illustrated below. Please note that some options will only be available for matters and tasks. A popup menu will allow users to create various entities from the chronology tab. For messages, users can reply or forward the message from this tab. Users can also copy the communications if required. We have also added filter to the chronology tabs.



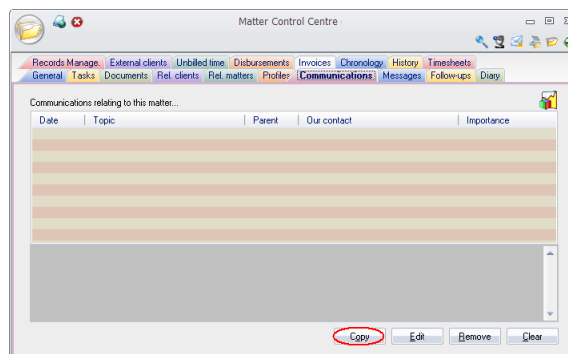
From this version, the notification messages sent from the communication form will carry the same characteristics of the communication form in terms of filing classification, related clients, tasks, and the importance.



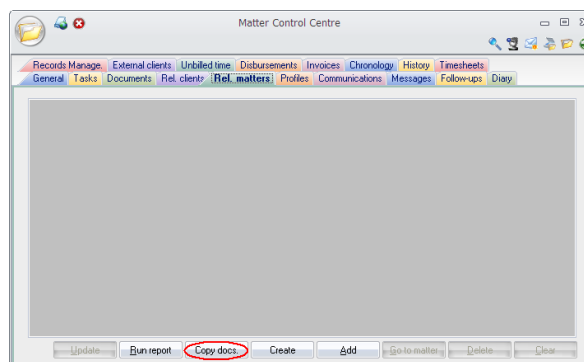
- Users can now navigate from a message in the messages tab of the Workcentre to a matter or task. When there are more than one tasks or matters, the use will need to select the correct entity from a list.



- We have added a copy button in the communication tab of the Client Control Centre, Matter Control Centre, Workcentre and the task edit form. This allows users to copy a communication.



- Copy document feature is amended. From this version, Synergy will copy the messages as well as communication as part of this process.



- When a trusted user was selected in the Workcentre, the “Go to matter” and “Go to client” buttons of the task tab were being disabled. This was not allowing the user to navigate to the matter. We have enabled these buttons from this version on to allow easy navigation to the matter and client.
- Allowed drag and drop of messages and documents on non-dormant tasks of all unapproved matters on the task tab of the Matter Control Centre. In previous versions, this could have only been done on active and on-hold tasks of active matters.

- Message attachment renaming convention has been extended to templates. From this version, different message templates can contain different document renaming convention. With this facility, sites no longer tied to a single renaming convention.

The left screenshot shows the 'Template Properties' dialog. The 'Message renaming convention' field is highlighted with a red circle. The right screenshot shows the 'Specify Document Naming Convention' dialog, which lists the following conventions:

- Document reference number
- Document name
- Primary client name
- Primary client account number
- Related client name
- Related client account number

- We have allowed the Email Client feature to use Rich Text Format for emails. This can be turned on from the company defaults. When this option is turned on, the user will be prompted to select the message template first. Once the message template is selected, the new email client form with Rich Text Format Email will be displayed.

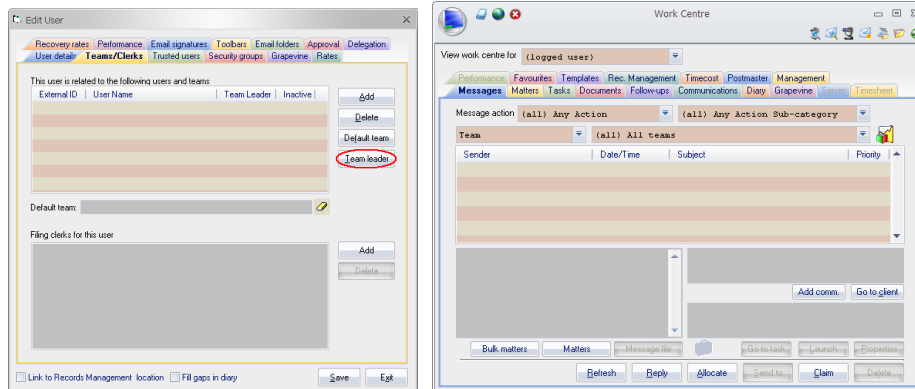
The left screenshot shows the 'Company Defaults' dialog. The 'Use Rich Text Format for EMail/Fax client feature' checkbox is highlighted with a red circle. The right screenshot shows the 'Email Merge To Clients' form, which displays the 'General' tab of the message template configuration.

- We have allowed follow-up types to be stored in templates. The follow-up types will be used for automated follow-up creation when creating communications and messages. Please note that the renaming convention from the template overwrites the renaming convention from the company defaults.

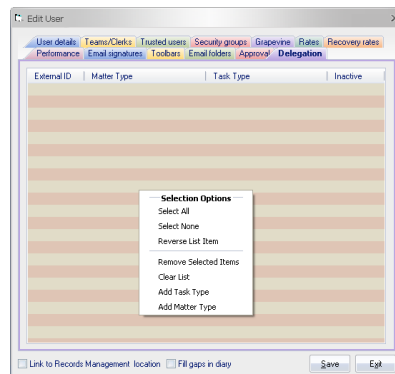
The screenshot shows the 'Template Properties' dialog. The 'Follow-up' section is expanded, showing the following options:

- Follow-up option: N/A
- Follow-up category: Create task related follow-up
- Follow-up type: Create client related follow-up

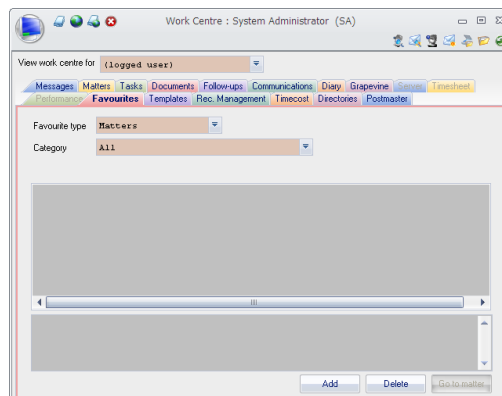
- In the previous version, we allowed the team leader to allocate messages to their team members. However, there was no mechanism to specify who the team leaders were. In this version, we have allowed sites to specify the team leaders for each team. With the introduction of this feature, we have restricted the message allocation function to the team leader.



- We have allowed sites to restrict users from delegating and sub-delegating tasks from the Workcentre and the task tab of the Matter Control Centre. This can be restricted at the matter or task type level.

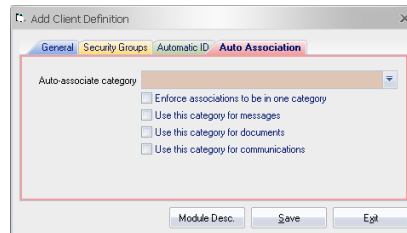


- We have allowed users to drag and drop emails and documents to the favourite tab of the Workcentre. This will only work if the favourite matters are selected from the drop down. Please note that the matter must be a master matter for the matter creation to proceed.

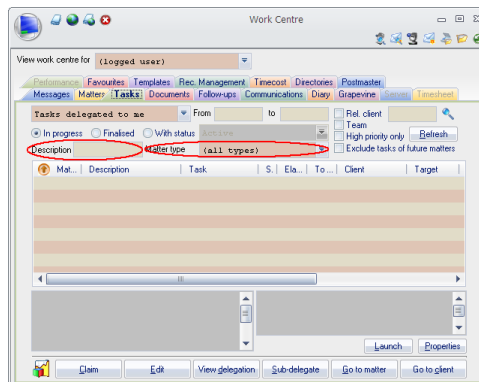


- We have added ability to auto-associate communications, messages, and documents based on association types similar to the matters. The association types can be

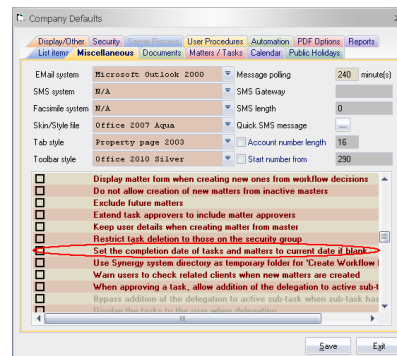
specified at the client type level. Sites can also specify what entities the association category should be used for.



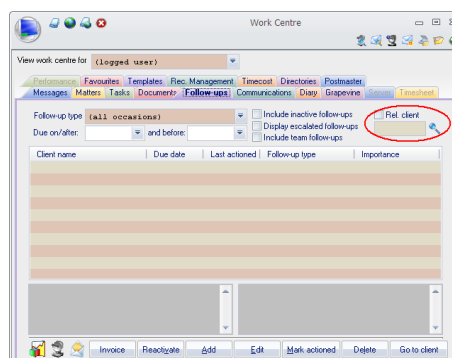
✚ We have added ability to filter the task tab by matter type and description.



✚ We have added an option that allows sites to default the completion date of the task and matter to current date. With this setting turned on, the users will not be prompted to specify the completion date of tasks and matters.

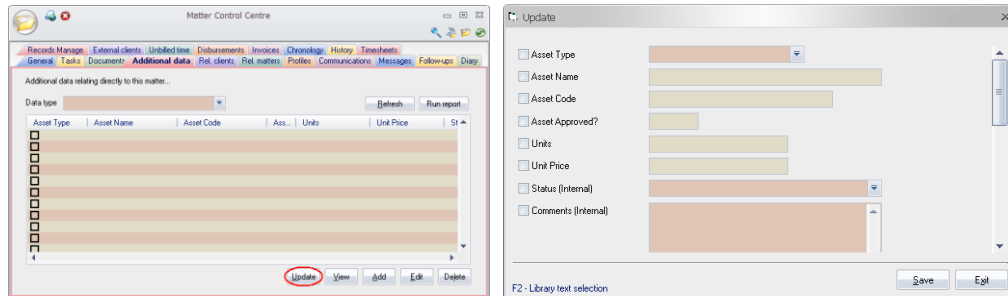


✚ We have added ability to filter the follow-ups by client or related client in the follow-up tab of the Workcentre.

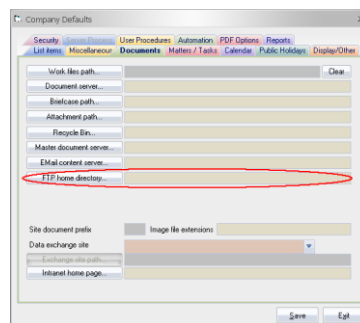




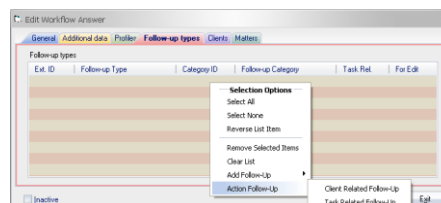
- We have added an update button to the additional data tab of the Matter Control Centre. We have also added multi-select check box to the additional data list. This will allow users to select a number of additional data rows and update certain column value for all of them. This will be less time consuming than having to update each row. Please note that when updating these rows, you must indicate which columns have to be updated by ticking the check box. The process will validate the security groups before updating the rows.



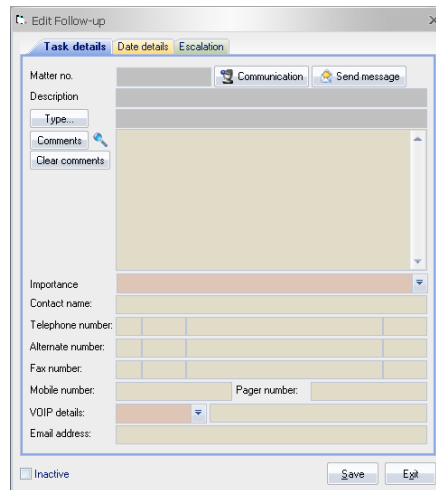
- Forwarded messages were placing the signature at the bottom of the message. This is fixed on this version.
- The Client Control Centre and Matter Control Centre were only remembering the loaded entity when the form was closed. In this version, we have changed this behaviour and the forms always remember the last client or matter that was loaded.
- Added ability to set the matter description and production notes via Software Development Kit.
- In our Software Development Kit, we have added the ability to copy documents to the document server using the FTP protocol. This will allow web sites the ability to upload documents to Synergy without having direct access to their document server. To facilitate this, we have added a FTP home directory to the company defaults form in Synergy. The specified folder will be substituted in the full path of the document before the FTP copy is started.



- Added a flag to the answer follow-up types. This will allow sites to allow actioning of exiting follow-ups as part of the workflow decisions. Please note that if you set this flag, all follow-ups with matching follow-up type for the matter will be displayed if the follow-up type is defined as task related. For client related follow-ups, the follow-ups of the primary client of the matter will be displayed.



- ✚ We have added a fax number and pager number to the contact details of a follow-up.



The screenshot shows a software window titled "Edit Follow-up" with three tabs: "Task details", "Date details", and "Escalation". The "Task details" tab is active. It contains a form with the following fields and controls:

- Matter no.:** A text input field.
- Description:** A large text area.
- Type:** A dropdown menu.
- Comments:** A text area with a "Clear comments" button.
- Importance:** A dropdown menu.
- Contact name:** A text input field.
- Telephone number:** A text input field.
- Alternate number:** A text input field.
- Fax number:** A text input field.
- Mobile number:** A text input field.
- Pager number:** A text input field.
- VOIP details:** A dropdown menu.
- Email address:** A text input field.

At the bottom of the window, there is an "Inactive" checkbox and "Save" and "Exit" buttons.

- ✚ Added ability to set the follow-up contact email address, fax number and pager number from Software Development Kit.

*Modification as at release 09.03.00a*

- ⊕ The Client Control Centre and Matter Control Centre were only remembering that last item loaded when the forms were closed. I have changed this so that it will remember the entities when they are loaded. That way, clicking the icons from ribbon bar will always bring the last entity that was loaded.
- ⊕ Fixed the redundant refreshing of the Work Centre. Hopefully, there are no other scenarios that would cause unnecessary refreshes.
- ⊕ There was a bug in deletion of email signatures. It was not resetting the email signature key in the user table. This was causing errors since there is FK/PK relationship at the database level.
- ⊕ There was a bug in Work Centre causing timesheet tab not to refresh when the “Refresh work centre” check box was turned off from the ribbon bar. This bug is fixed now.
- ⊕ There was an extra table that was being joined when filling work item tab of the Work Centre. This table has been removed from the SQL statement and hopefully should improve performance a little bit.

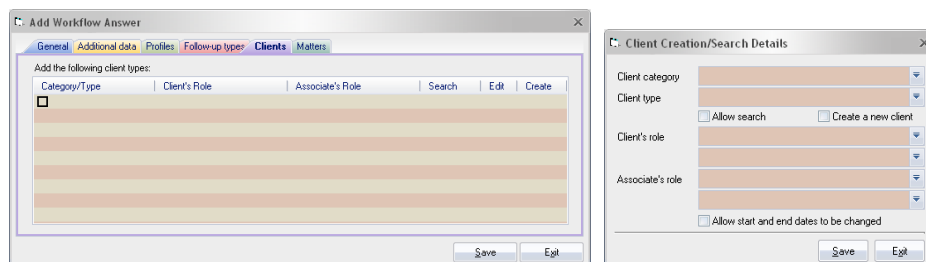
## Modification as at release 09.03.00



In order to streamline the workflow decisions, we have added the following features to the workflow answers:

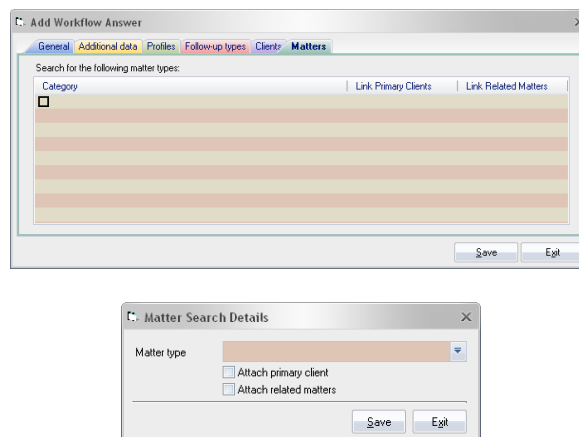
### Client options:

- Users can configure answers to create and/or search for specific clients types. It is also possible to search the database and only create a client if the desired client is not in the database.
- Once the clients are created or selected, these clients are linked to the matter as related clients.
- You can optionally associate these clients to the primary client of the matter. Please note that the association types must be pre-configured at the answer.



### Matter options:

- Users can configure answers to search for specific matter types. Once the matters are selected, they will be linked to the matter as related matters.
- You can optionally configure the answer to link the primary client of these matters as related client to the matter.
- You can optionally configure the answer to link the related matters of these matters as related matter of the current matter.



### Other options:

- You can configure the answer to place a task on hold. Available options are:

Placing first active task on hold,  
Placing all active tasks on hold,  
Allowing user to select a task and then placing that task on hold.

When the last hold option is selected, the user must select a task that is a

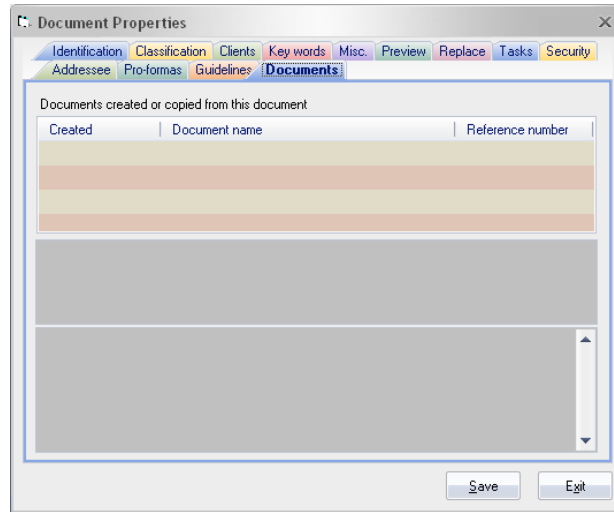
child of the current decision, that is, the task must be an active task directly below the current decision. Selecting any other task will be ignored.

- You can configure to send a message as a result of the decision. You can optionally configure a message template to be used for this.
- You can configure the answer to allow the editing of the primary client details.
- You can configure the answer to allow editing of the budget figures for the matter. If you use this option, the matter form will be loaded and the disbursement tab will be selected.
- You can configure the answer to create an invoice. The invoice creation form will be loaded once this option is selected. Please note that the timecost related options will only be done if office and timecosting module is enabled.

✚ The task edit form will now display the client value next to the rating in the general tab.

✚ When a site is configured to keep track of document copies, when you create or document say D2 from a non-master document say D1, the document properties form for D1 was displaying the documents tab. In many cases, when looking at the properties of the copied document D2, you may want to know, the document that it was copied from. We are now displaying the document tab on both cases. When looking at the properties of the copied document the caption at the top will display **“This document is copied from the following document”**. We have also added a

client list and the standard text box that displays information about the selected document from the list. Double clicking the list entry will bring up the properties form for the selected document.



✚ We have added two new menu options for diary appointments. In some cases, when a client confirms the appointment, a task may need to be approved. In these cases, a new “**Accept and approve**” menu option will allow user to select an active or on hold task from the matter and perform the two process from a single menu selection. The alternative would be:

- Confirm the appointment.
- Select the “Go to matter” menu option.
- Once the Matter Control Centre is opened, click the task tab.
- Select the correct task and click the edit button.
- And finally, click the approve button.

As one can see, this new menu option will be a much quicker way to achieve the same result. Please note that when this menu is selected, the task selection form will be displayed with the first active/on hold task selected. Selecting exit from this form will terminate the whole process, leaving the appointment unconfirmed.

Today (Thursday, 11 November 2010)

Style ▶

Print ▶

Go to client

Go to matter

---

**User Confirmation**

☒ Accepted

☐ Decline

☐ Tentative

---

**Client Confirmation**

☐ Accept

☐ Decline

☒ Tentative

**Accept and approve**

---

Edit appointment

Delete appointment

Create follow-up

Create follow-up

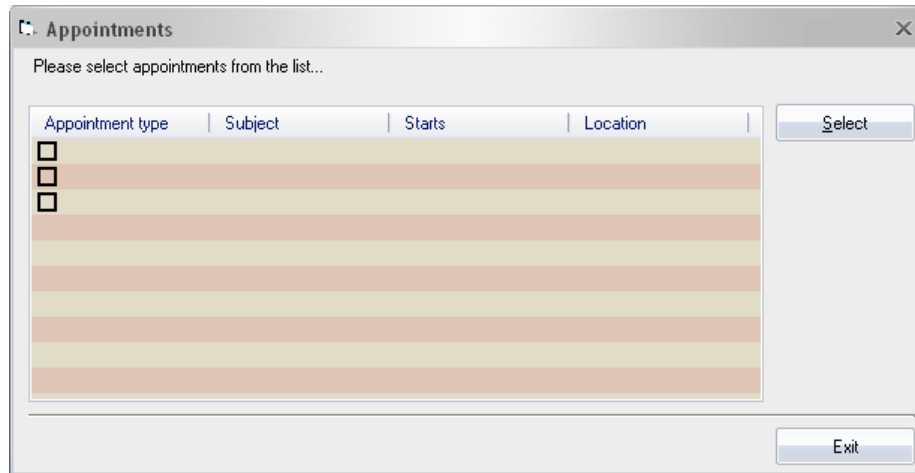
Client features ▶

**Bulk SMS clients**

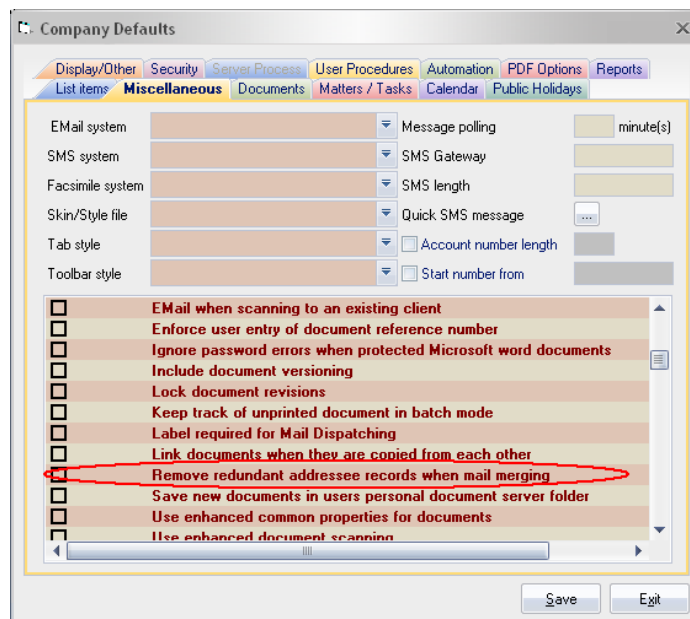
Export appointment

Create communication from external appointments

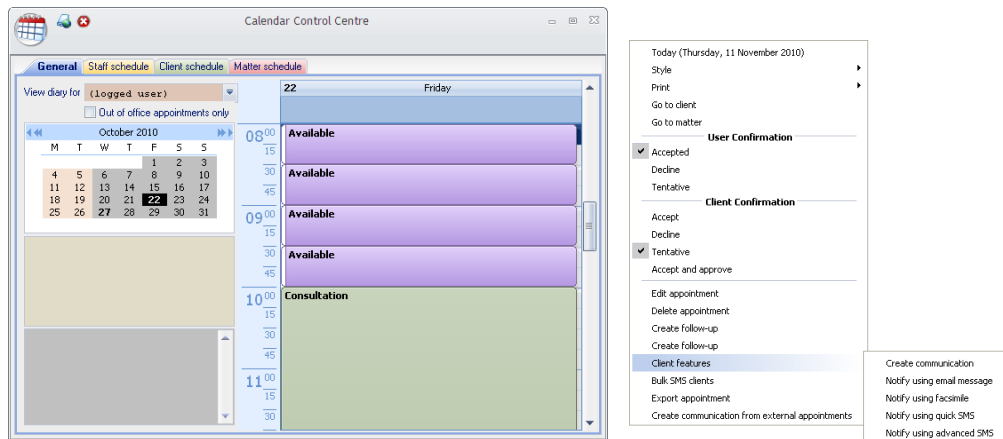
Some sites may also use the SMS feature from Synergy to send reminders to the clients about their appointments. In many cases, a number of appointments have to be confirmed for a single day. In previous versions, these SMS messages had to be done one at a time. A new menu option “**Bulk SMS clients**” allows users to send SMS in bulk to a number of clients. When this menu is used a list will be displayed with all of the appointments currently displayed on the diary allowing user to select the appropriate appointments. Once the appointments are selected, the user is asked whether they would like to edit the content of SMS messages before they are sent. Please note that answering yes will display the content of the SMS messages for every client of every selected appointment.



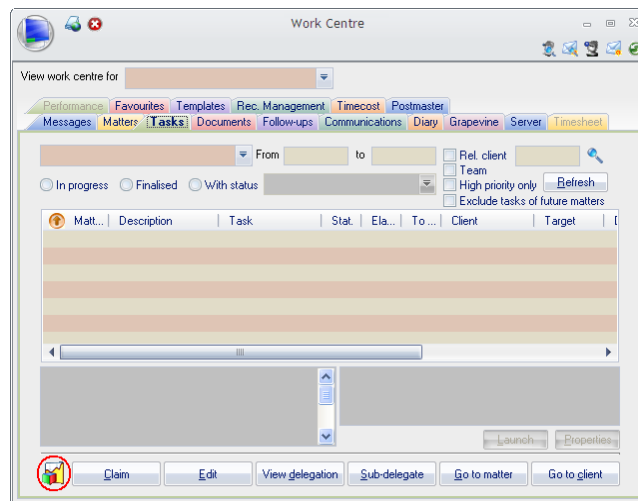
When addressees are used for word documents, the mail merge table will include a record for each primary client in the addressee tab and one record per addresses for clients in the addressee list. In many cases, the record for the primary client may not be required when specific addresses are listed. We have placed a setting in the company defaults that allows users to remove these redundant records if they need. Please note that the primary clients that do not have specific addressees will still remain in the merge table.




- There is a setting in the company defaults that allows users to modify the subject line of an Outlook message in Synergy when it is imported. However, when a user imports the Outlook message and sends it to his/her filing clerk, Synergy was not allowing the filing clerk to amend the subject line of the message. This version allows the filing clerks to amend the subject line of a message when the above setting is in place.
- The client features of the diary appointments were not copying the tasks when creating communication and other entities. The tasks are now being added to the newly created entity.



- We have added a report button to the task tab of the Workcentre that will print the content of the list view. The ZZDELEGN.RPT report must be copied from the installation package to your system directory for this button to work. Please note that the criteria used for the report is identical to the criteria used for displaying the entries in the list view, that is, the date calculation will be identical. If you have excluded some entries, these excluded entries will not be in the report either.





# Workcentre Task/Delegation List

Matter No.	Matter Description	Task Description	Status	Delegated To/Target Client name	Target	Delegated To/Reviewer	Received
<div> <div>Status Legend:</div> <div> DO - Deceased,  OH - On Hold,  AB - Aborted,  IP - In Progress,  UR - Under Review,  AP - Approved </div> </div>							

Page 1 of 1





In previous versions, we introduced the ability to create matter, client, communication and follow-up from diary appointments. In organisations where bookings are an essential part of a business, and there are legal requirements to actually pose specific questions during the booking process, certain stages of the workflow may actually be complete after the booking is done. In these instances, it would be ideal to combine the approval of that specific step of the newly created workflow once the booking process is completed. We have added a new setting to appointment types that allows users to specify how task approval should proceed. There are four options as you can see from the below image. On hold tasks are considered as active and will be considered for this process if there is no active task. Please note that allowing task selection will only approve the task if the task is either active, on hold or under review. If the selected task has any other status, it will be ignored.

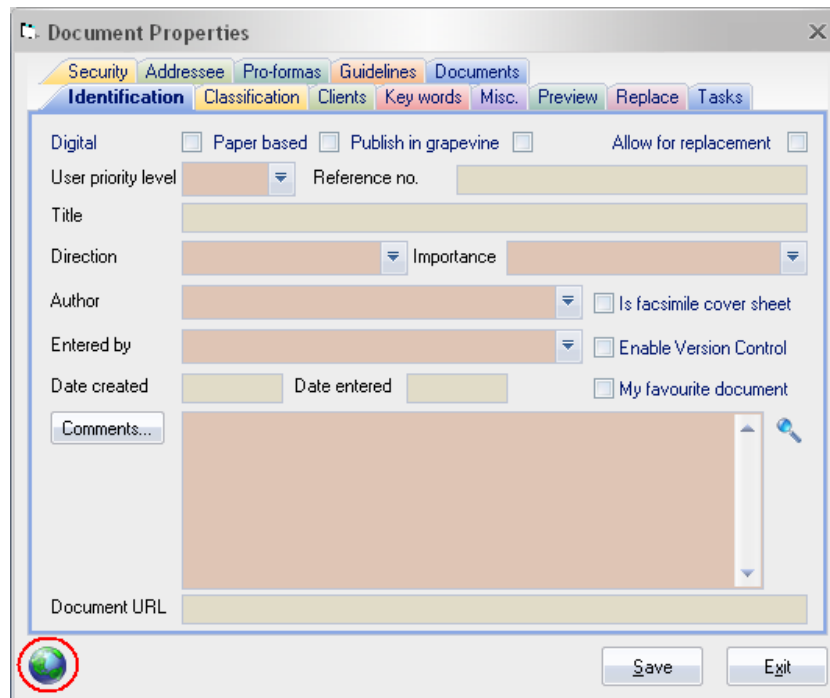


When Email messages are imported from Outlook, users now have the option of publishing it in the grapevine. However, double clicking the message in the grapevine tab was opening up the Synergy's message form. From this version on, the double click of an imported Outlook message will launch the message file. Users still have the option of loading Synergy's message form if they wish by clicking the properties button.

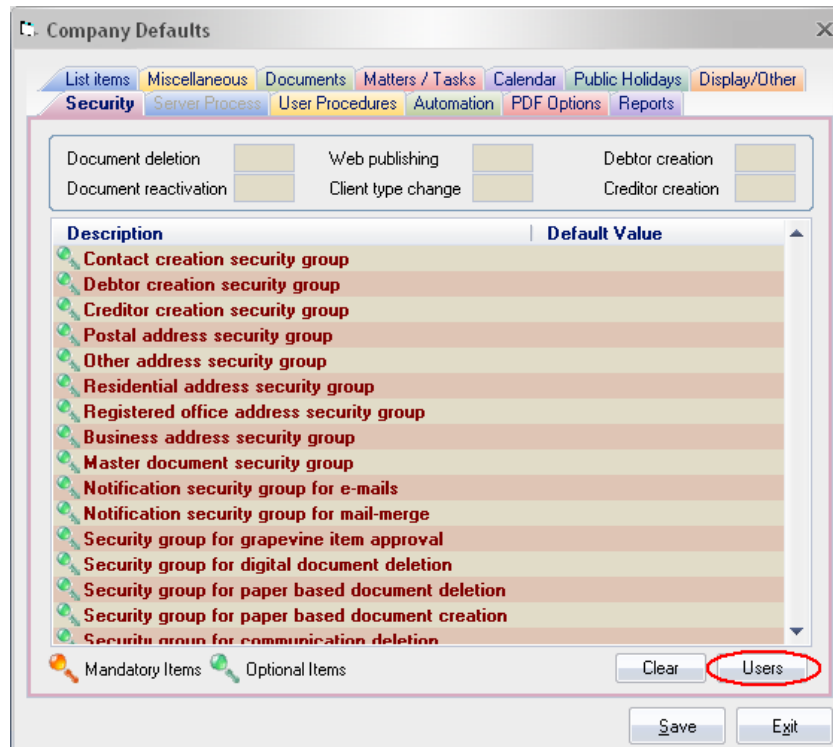


On document properties form, we have added a URL button. This button allows users to launch the URL path specified in the document URL entry field. Please note

that the URL button does not check the validity of the entered URL. It will simply attempt at launching the specified URL.

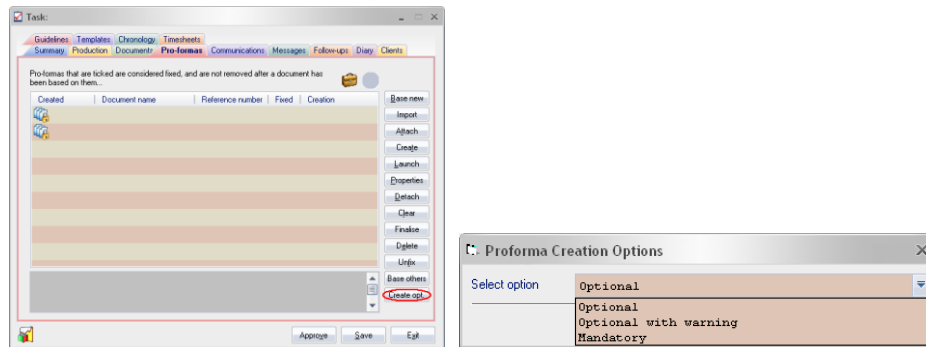


- Added a “Users” button in the security tab of the company default. Clicking this button will display the list of users in the selected security group.

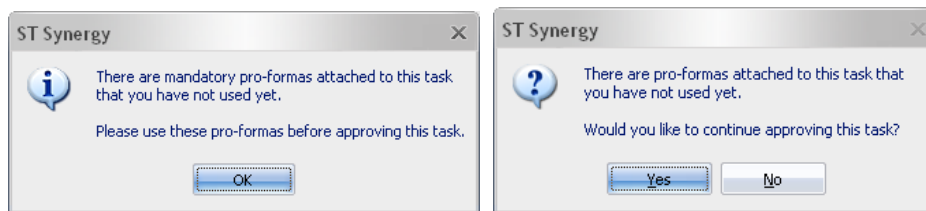


- When users configure pro-formas for tasks in a master matter, in many occasions, it may be useful to indicate those pro-formas that might be mandatory to be used before the task is approved. This could also act as a useful reminder to those users processing the workflow which may forget to produce necessary documentation. We

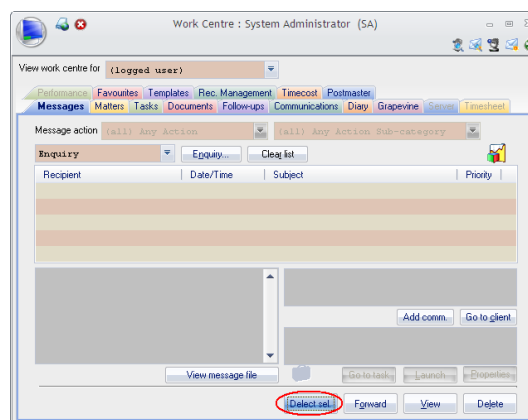
have amended the pro-formas to allow user configuring a master matter to specify the creation option for pro-formas in a master matter. This can be done from a button in the pro-forma tab called “**Create opt.**” as indicated in the following image.



Three options are available to users, optional, optional with warning and Mandatory. These options are checked during task or matter approval. If Synergy finds at least one pro-forma with mandatory flag still attached to a task, it will abort the task or matter approval. If it finds at least one task with optional with warning flag, it will ask the user whether the approval should proceed. Please note that when users base a new production document on a fixed pro-forma, Synergy will automatically change the pro-forma flag to optional after the successful creation of the production document.

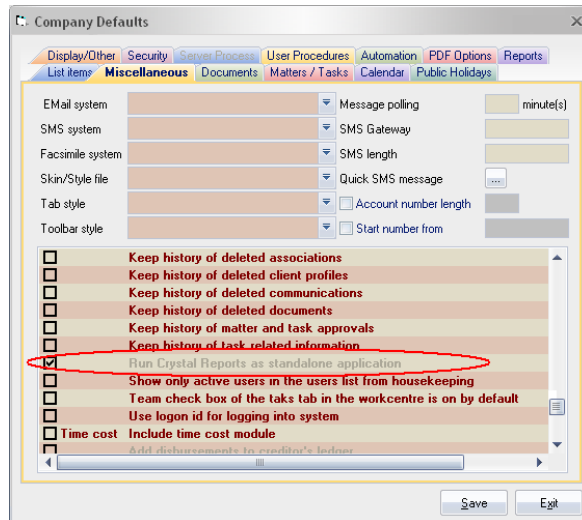


- In Workcentre messages tab, exiting from the message enquiry form after selecting the “Enquiry” option from the drop down was leaving the messages list unchanged. This was giving the wrong impression that list is resulted from the enquiry. We have cleared the list in this situation to remove any confusion that this may create. We have also added a “**Delete sel.**” Button to the enquiry option that allows users to delete the selected messages from the enquiry list. If there is an error in deleting a message, the user will be asked if s/he would like to continue the process. Answering no will abort the process. Please note that this question will be asked only once rather than on ever deletion error.

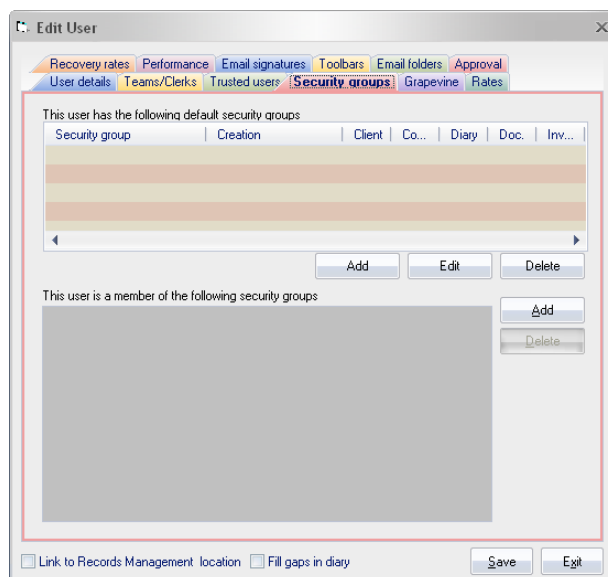




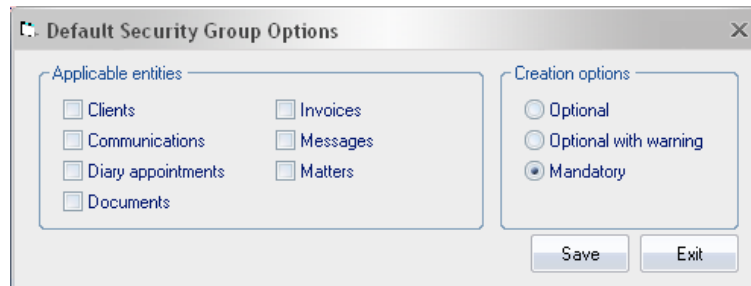
In the housekeeping, company defaults, there was an option that allowed users to specify that they would like to run Crystal Reports as an out of process application. When this check box was not ticked, Crystal Reports were being loaded in process using a Crystal OCX that was embedded in Synergy. Given that the OCX is an old Crystal OCX which may not be able to handle reports designed in later versions of the Crystal, we have made use of this option mandatory. What this means is that users has to install Synergy's report viewer in order to run Crystal Reports. Please note that you should not install the Synergy's report viewer on machines that have Crystal Reports Designer installed. Doing this will cause problems for Crystal Reports Designer.



In some sites, administrators may want secure documents, communications, appointments and messages created by specific users to a certain security groups. This can be achieved through users going to the security tab, and finding the relevant security group and adding it to the list of security groups in that tab. As you can see, there are a few steps that user has to take to achieve this. From this version, we have allowed default security groups to be stored for each user. Administrators can also specify whether the security group is “Mandatory”, “Optional With Warning” or completely optional.



We have further allowed administrators to specify the entity types that the security group relates to. A security group can be set to relate to all entities that have security groups attached to them. Alternatively, it could be related to single entity type.

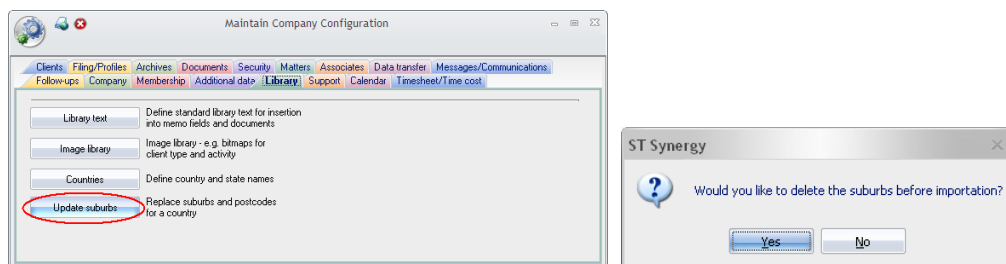


Please note that a security group must be related to at least one entity type. We have amended Synergy to check these default security groups when a user creates any of the above entities in interactive mode. The mandatory security groups will be added automatically to the list of security groups. If Synergy finds any default security groups specified as optional with warning that is not included in the list, it will allow the user to specify whether these groups should be included as well. Please note that when editing security groups, the entity type and creation option can only be determined safely if a single entry is selected. If multiple entries are selected, the options form will turn off all of the options.

We have also ensured that any batch processing from the Synergy user interface considers these security groups wherever it makes sense. Please note that because of the nature of batch processing, in many cases the appropriate maintenance form for the entity may not be loaded. In these cases, the user will be allowed to determine which default security groups if any should be added before the batch process starts creating entities.

The Software Development Kit library has also been amended to consider these security groups. This library will always add the mandatory groups to the created entity. However, the application developer can specify whether the optional with warning security groups should also be added. We have also provided methods to extract these default security groups for various entity types. The creation option can also be passed to this method allowing application developers to perform whatever that is necessary for their application.

- When updating suburbs, the users were not getting a chance to delete the exiting suburbs and reload them from the selected file. Synergy has been amended to allow users to delete the suburbs before loading the new ones.



- Added a flag to additional data columns that allows Synergy to lock them from data entry. This may assist sites to display some information to the user helping to enter the data in the form without the possibility of adding unnecessary information to the database. Fixed columns will only exists as a definition from the point it has been

created. There will be no data captured for these columns anywhere in the system. They will also be filtered from the lists displayed in the system.

The image shows two screenshots of software windows. The left window is titled 'User defined item' and contains various input fields: ID, Description, Select data from (dropdown), Data type (dropdown), Maximum length (with a 'Fixed' checkbox circled in red), Input is mandatory (checkbox), Picture format, Default value, Minimum value, Maximum value, Mouse hover text, and Has list (checkbox). At the bottom are 'Save' and 'Exit' buttons. The right window is titled 'Add' and shows a 'Fixed Column' label circled in red, with other input fields and 'Save' and 'Exit' buttons at the bottom.

Please note that Synergy will not create an additional data value for any fixed columns. Additionally, all fixed columns will also be filtered from additional data reports before the report data is exported.

The image shows a screenshot of the 'Add Additional Data Report' window. The 'General' tab is selected. It contains fields for 'Report document...', 'Report description', and 'Access level' (set to 1). There are checkboxes for 'Ask for account number range before running the report' and 'Ask for matter range before running the report'. Below these, it says 'For designing your report, add the necessary tables using the following Data Source Names from Crystal Report :'. There are two text boxes: 'Access additional data using : AdditionalDataReportDSN' and 'Access company data using : AdditionalDataReportCompanyDSN'. At the bottom, there is a checkbox for 'Create temporary table after saving' and 'Save' and 'Exit' buttons.

Since both the replacement symbols and additional data fields have a fixed flag, the additional data and replacement symbol data entry form has change to lock the controls based on their fixed attribute. In the past, the fields were locked based on a combination of their mandatory flag and their default values.

The image shows a screenshot of the 'Add Audit' window. It contains three input fields: 'Audit report due date', 'Was report qualified', and 'Auditor's Name'. At the bottom are 'Guidelines', 'Save', and 'Exit' buttons.



When capturing additional data, you can configure the additional data fields to allow user to search and select certain attributes of clients, matters, communication etc. We have extended this to client associations and indirect associations on this version, that is when capturing additional data, the user can now use data from the associates of a

client (when capturing client related additional data) and the primary client of a matter (when capturing matter related additional data) from the database. When capturing data, a search button will be displayed next to the additional data field allowing users to select the correct information.

The left screenshot shows the 'User defined item' configuration window. It has fields for ID, Description, Select data from (set to 'Indirect Association'), Data type (set to 'Client'), Maximum length (set to 'Matter'), Picture format (set to 'Communication'), Default value (set to 'Indirect Association'), Minimum value (set to 'Indirect Association'), Maximum value, Mouse hover text, and a 'Has list' checkbox. The right screenshot shows the 'Add Audit' window with fields for 'Audit report due date', 'Was report qualified', and 'Auditor's Name'. A search button is located next to the 'Auditor's Name' field.

When the search button is clicked, the normal association selection form will display allow the user to select the correct associate. Once the associate is selected, the relevant attributes of the associate will be displayed allowing the user to finally capture the data.

The left screenshot shows the 'Select An Associate' window with a list of clients. The right screenshot shows the 'Select Value' window with a list of available values for a selected associate.

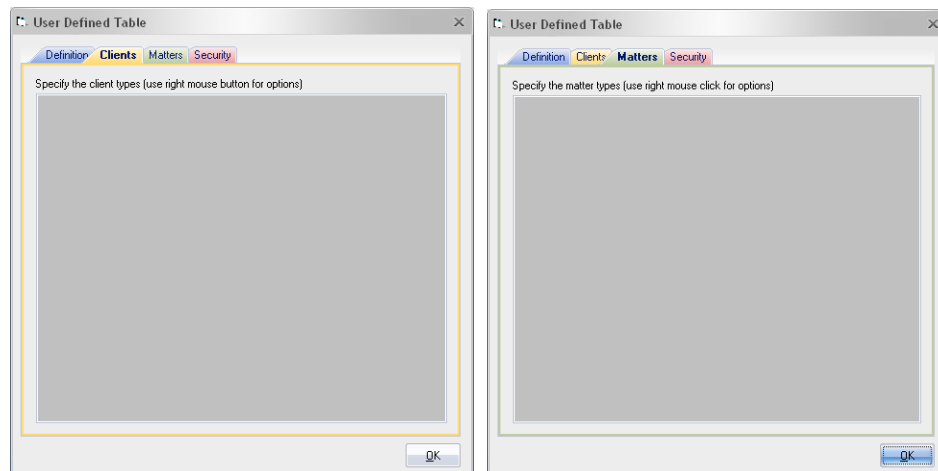
Please note that when using indirect association option, the select associate form will be displayed twice, once to select the associate of the client and a second time to select the associate of the selected associate (hence indirect).

Added a new tab to the license server to display the currently pending requests from the client applications. This tab is only there to verify that the license server has not left any requests unprocessed. If you do see an entry in this list, you may need to restart the license server. But in general, the list on this tab should always be empty.

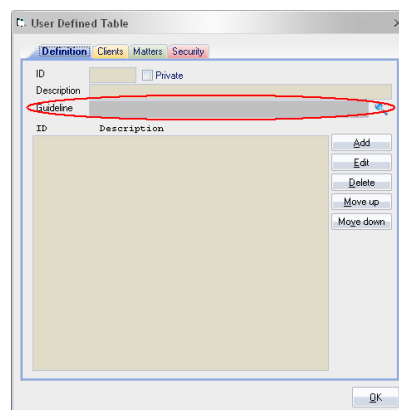
The screenshot shows the 'ST Synergy License Server Process - [Home Screen]' window. It has a menu bar with 'Repair', 'License', 'Log Out', and 'Exit'. Below the menu bar is a tabbed interface with tabs for 'License details', 'History', 'Current Connections', 'Request Queue', and 'Add/Remove Features'. The 'Request Queue' tab is selected, showing a large empty area for pending requests.



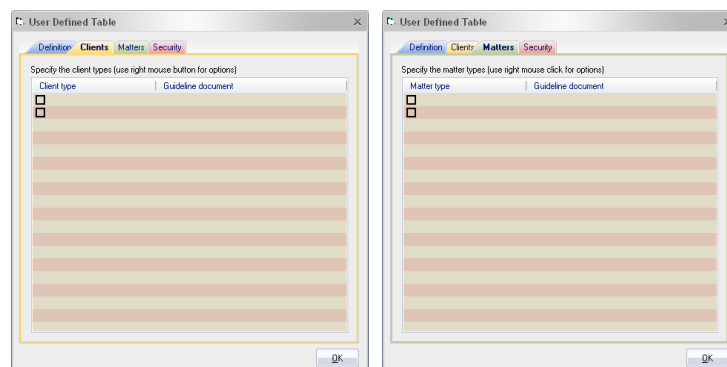
We have changed the client and matter type lists in the additional data form to a sortable list view. We have also removed the buttons and replaced it with popup menu.



We have added the ability to specify a guideline document for capturing additional data.

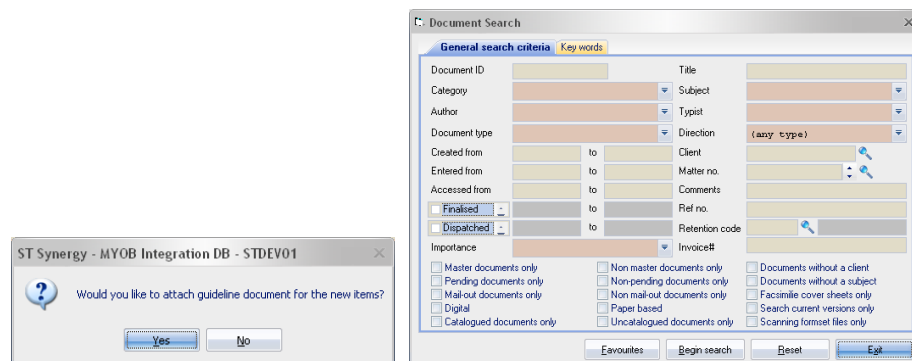


The users can further customise these guideline documents for each client and matter type. This will provide the maximum flexibility in setting up various guidelines for capturing data for various types of matters and clients. The normal hierarchical rule applies when guideline documents configured at multiple levels, that is, a guideline document specified for a matter type takes precedence over the guideline document specified at the additional data level.

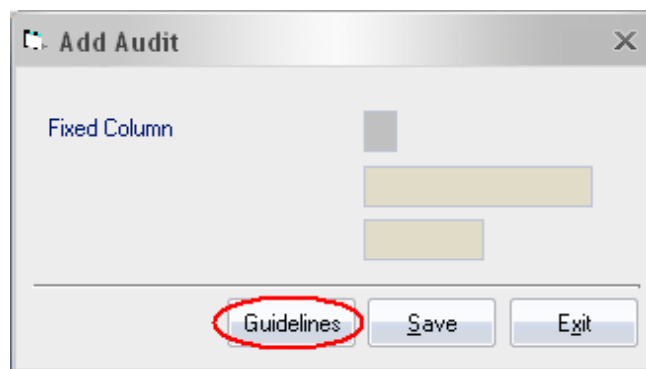




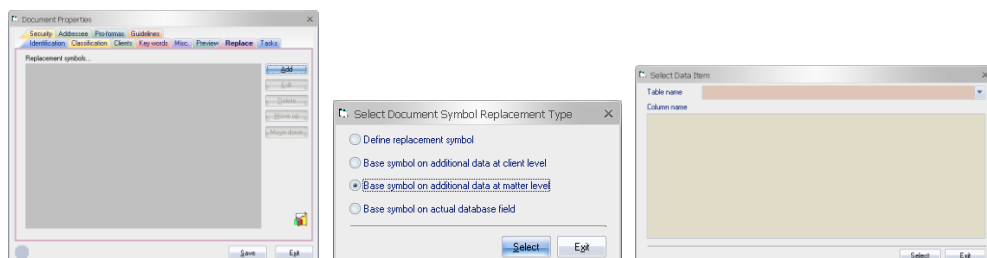
When adding the client types and matter types, the user will be asked whether s/he would like to set up a guideline document for the client and matter types that are being added. If the user answers yes, then the document search from will be displayed allowing user to locate the guideline document. Once the guideline document is selected, then the list of client/matter types will be displayed for the user to select.



When guideline documents are set, a guideline button will be displayed in the additional data form allowing users to launch the relevant document. Please note that secured guideline documents will follow the normal security checking before launched.



- When defining document replacement symbols based on additional data items, the displayed list of additional data columns was not sorted in the same manner as the way they were in the additional data maintenance form. In this version, we have changed this so that the external identifiers are displayed and the list is sorted identically to the way it was in the additional data maintenance form. We are also displaying these in a larger form.



- In some organisation (sales oriented organisations), users may want to group postcodes and suburbs into a user defined, sale territories and zones. These territories and zone may not necessarily follow the state boundaries. Further more, specific people may be made responsible for these territories and zones. In the previous

versions of Synergy, there was no facility to accommodate for this. We have extended Synergy to allow for definition of sales zones and territories.

The image shows two side-by-side screenshots of software windows. The left window is titled 'Maintain Zones' and contains fields for 'External ID' and 'Zone name'. Below these are two tables. The first table has columns: 'Account no.', 'Responsibility of', 'Business name', and 'Inactive'. The second table has columns: 'Territory ID', 'Territory Name', and 'Status'. At the bottom are checkboxes for 'Inactive' and buttons for 'Save' and 'Exit'. The right window is titled 'Maintain Territories' and contains fields for 'External ID', 'Name', and 'Description'. Below these are two tables. The first table has columns: 'Account no.', 'Responsibility of', 'Business name', and 'Inactive'. The second table has columns: 'Postcode', 'State', and 'Status'. At the bottom are checkboxes for 'Inactive' and buttons for 'Save' and 'Exit'.

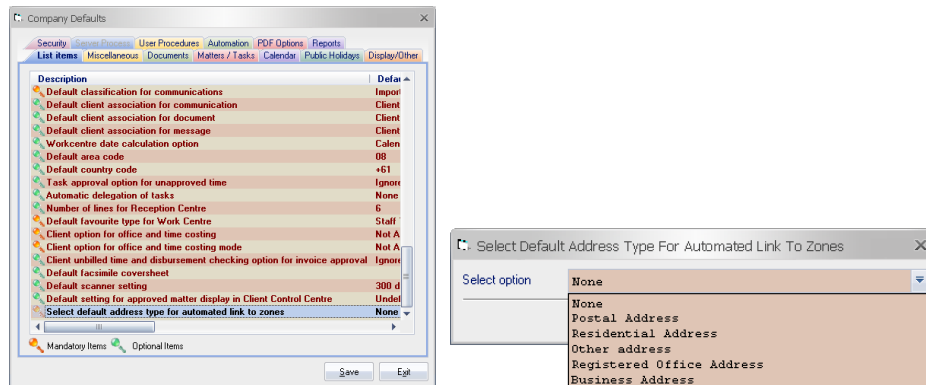
We have added a new “Countries” tab to the housekeeping form. The “Countries” and “Update suburbs” buttons have been moved into this new tab grouping all geographic related function into one tab.

The image shows a screenshot of the 'Maintain Company Configuration' window. It has a tabbed interface with tabs: 'Clients', 'Filing/Profiles', 'Archives', 'Documents', 'Security', 'Matters', 'Associates', 'Data transfer', 'Messages/Communications', 'Follow-ups', 'Company', 'Membership', 'Additional data', 'Library', 'Support', 'Calendar', 'Timesheet/Time cost', and 'Countries'. The 'Countries' tab is selected and highlighted. Inside this tab, there are three buttons: 'Countries' with the description 'Define country and state names', 'Update suburbs' with the description 'Replace suburbs and postcodes for a country', and 'Zones' with the description 'Maintain territories and zones'.

We have added a “Zone” tab to the Client Control Centre so that the territories linked to a client can be seen

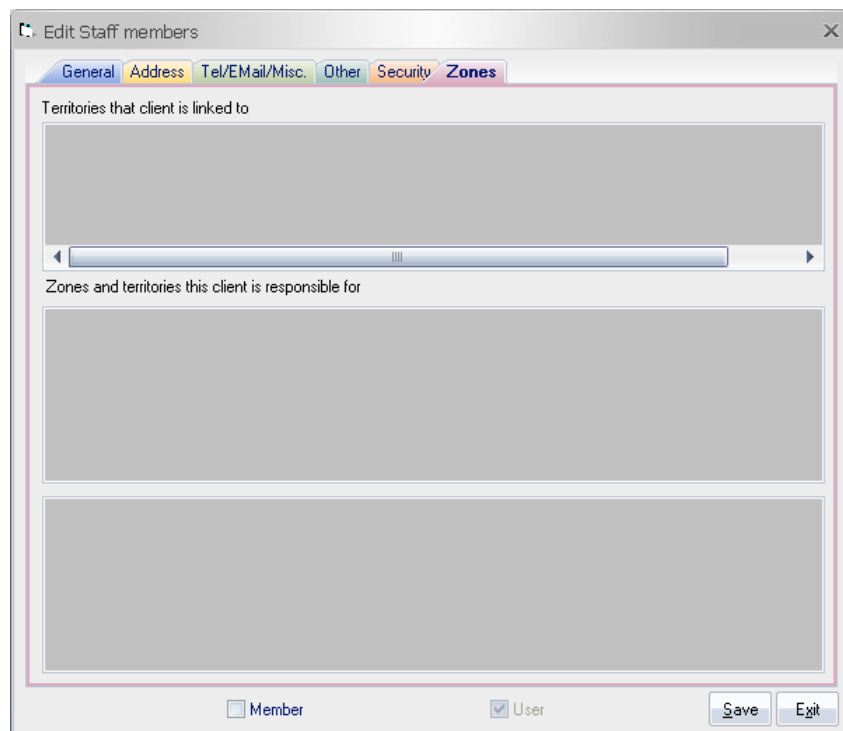
The image shows a screenshot of the 'Client Control Centre' window. It has a tabbed interface with tabs: 'General', 'Documents', 'Profiles', 'Associates', 'Referrals', 'Archives', 'Matters', 'Communications', 'Messages', 'Diary', 'Additional data', 'Ext. Info', 'Chronology', and 'Zones'. The 'Zones' tab is selected and highlighted. The main area of the window is currently empty, showing a large grey rectangle.

Two new settings have been added to the company defaults related to zones and territories. The first option allows administrators to specify the postcode from which address should be used for automated linking of clients to territories. When set, the client maintenance forms will check the territory list to ensure that the territory covering the specified postcode code is in the list. A warning will be displayed if the territory is not in the list.

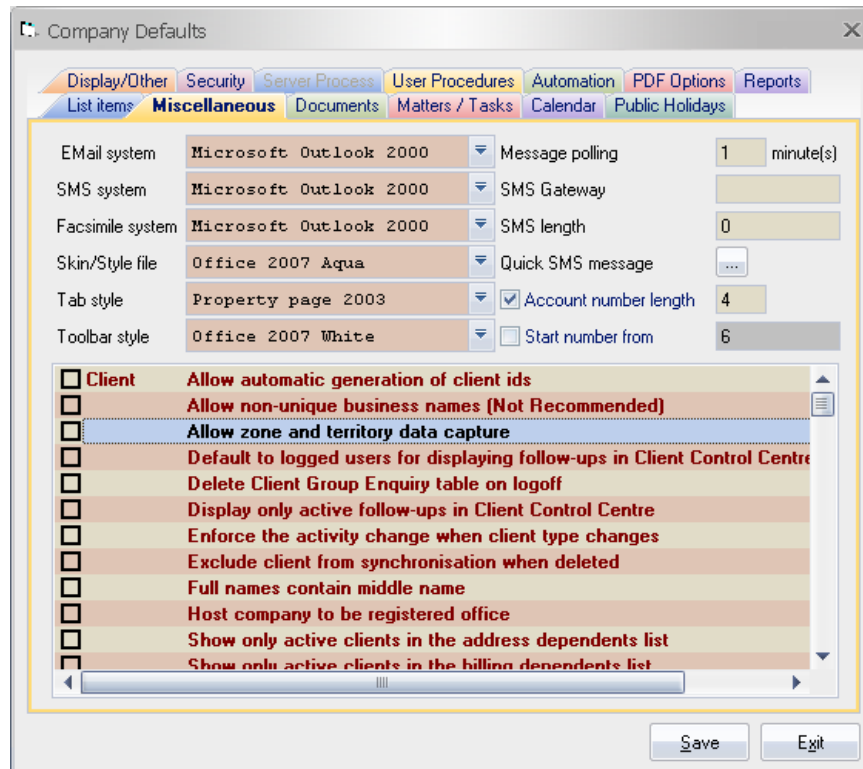


Please note that there are two ways that a client could be linked to a territory. The first method is using the postcode to link the client to a territory. This linking specifies which territory the client is located. The second method is linking the client as the person responsible for the territory. In a sales sense, when a client is made responsible for a territory, organisations consider that person their sales representative in that territory. This is conceptually different from the first method of linking and at the database level, the data is collected in two different tables.

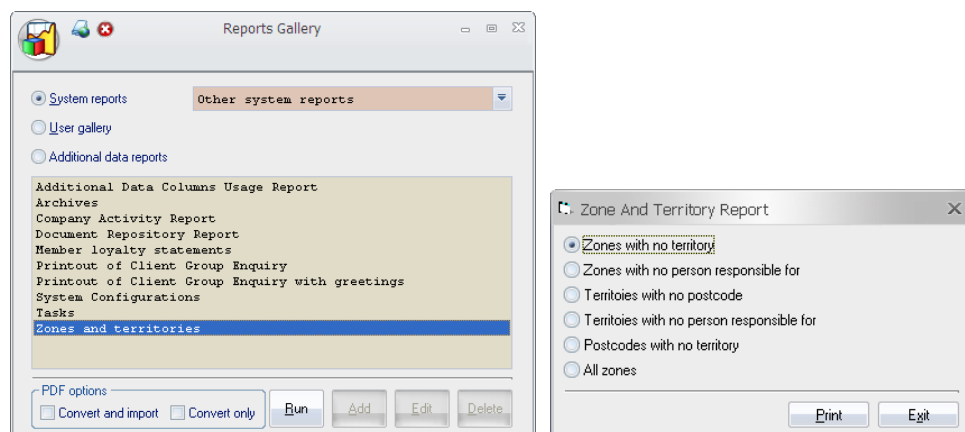
When editing clients, a new zone tab will allow users to link clients to the territories that they are located in. In the edit form for individuals, there will be two extra lists in the zone tab. These two extra lists will display the zones and territories that the client is responsible for. Please note that only housekeepers can maintain these two extra lists.



The second option allows administrators to turn off the zone and territory data capture. This is done from the list on the “Miscellaneous” tab. Turning off this option will make the zone tabs invisible everywhere and will disable the zone button in the house keeping. Please note that you will not lose the existing data and they will remain in the database.



We have also added a new system report that allows users to extract zone and territory information. This Report allows users to determine territories that have not postcodes, postcodes that have not been allocated to any territories etc.



✚ We have allowed questions to be marked for immediate processing. With this new attribute in place, there are three possible configurations for a question:

- Data capture and immediate processing both turned off. This is identical to current normal questions.
- Data capture flag turned on and immediate processing turned off. This is identical to current data capture questions.

- c) Data capture flag turned off and immediate processing turned on. This new configuration will allow the decisions to be processed the minute they are created.

The 'Add Workflow Question' dialog box has a title bar with a close button. It contains three input fields: 'External ID' (a single-line text box), 'Description' (a single-line text box), and 'Comments' (a multi-line text area). Below these fields are two checkboxes: 'For data capture and workflow linking only' and 'Process this question immediately after task creation'. To the right of the checkboxes are three buttons: 'Add', 'Edit', and 'Delete'. At the bottom of the dialog are 'Save' and 'Exit' buttons.

Data capture and immediate processing flags cannot both be turned on. This configuration is invalid and is impossible through Synergy user interface.

Workflow creation process through Synergy user interface has been amended to process any decisions that are marked for immediate processing after the matter has been created. Please note that this process is recursive in nature, that is, if approving a decision creates other decision marked for immediate processing, they will also in turn be processed immediately.

- When exporting timesheet entries from Workcentre, if the file name contained spaces, an error stopped the timesheet export function. From this version, we have amended Synergy to accept file names with spaces for its timesheet export feature.

The 'Export Timesheet' dialog box has a title bar with a close button. It contains several fields: 'Staff member' (a dropdown menu showing 'SA System Administrator'), 'Matter type' (a dropdown menu), 'Client' (a text box with a magnifying glass icon), 'Start date' (a date picker showing 'Tuesday, 30 November 2010'), and 'End date' (a date picker showing 'Friday, 31 December 2010'). Below these are three checkboxes: 'Include', 'Matter numbers', 'Account number', and 'Task identifiers'. At the bottom are 'Export' and 'Exit' buttons.

The 'Error Has Occurred!' message box has a title bar with a close button. It contains an information icon, the text 'Number: 3067', and the description 'Query input must contain at least one table or query. MakeTableQuery'. At the bottom is an 'OK' button.

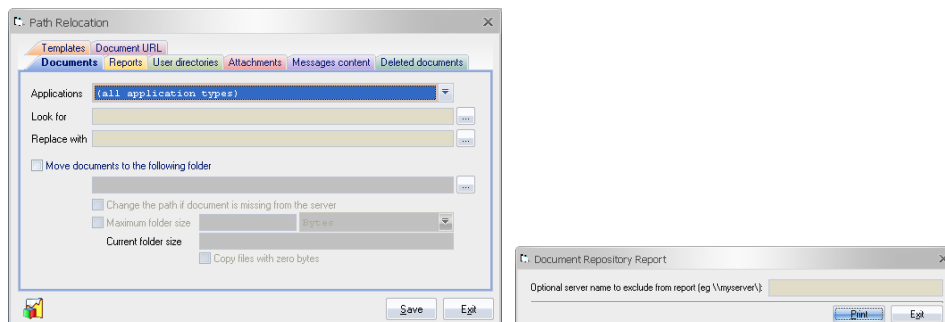
- When sites were using long grapevine messages, the status bar was pushing some information outside the visible window. This is fixed on this version.



- In the workflow form, Synergy was passing the identifier of the logged user as the approver of task rather than looking at the real approver of the task. A consequence

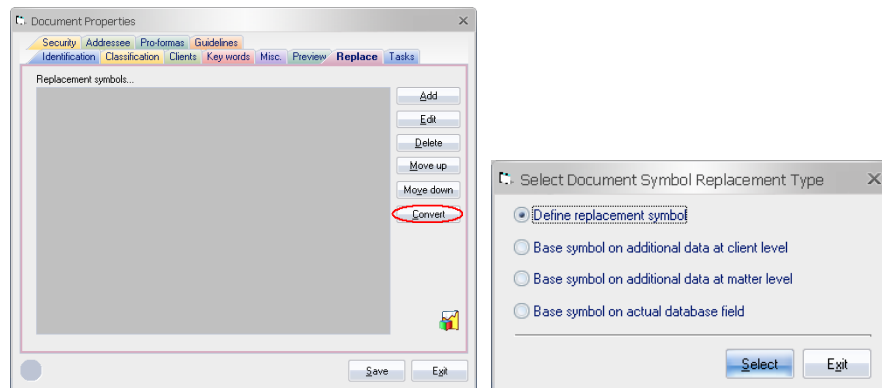
of this was that anyone that was scanning document could have approved active tasks. This is fixed now.

- ✚ Deleting matters and tasks was not cleaning the approval history records. These approval history records will be deleted from this version onwards.
- ✚ When deleting documents, in some special cases, the finalisation snapshots were left intact. These records are now cleaned up as part of the document deletion and reactivation process. Upgrade to this version will clean any orphan records.
- ✚ Synergy application was handling numerous referential integrities. From this version, we have transferred all these referential integrities to the underlying database management system. A few referential constraints had to remain in the application since the values on these columns could refer to more than one table depending on the value of another column. For example, in the grapevine table, the value stored in “EntityID” could refer to a message, document, communication etc. The way application interprets this column is tied to “EntityType” column. This sort of referential constraints is not supported by database platforms used by the application yet.
- ✚ When relocating documents, Synergy provides a report to assist users locate directories used by the application. This report runs through every table contains a file path and reports the directories used within that table. We have improved efficiency of this report for systems running on SQL Server backend. A SQL Server 2000 database running on an old Pentium PC going through 600,000 records took 40 minutes to produce the report using the old method. With the new improvements, the same report can be produced in 40 seconds. We have also removed all strings starting with “http:”, “https:” and “www.” from the document URL table since these are not files paths.



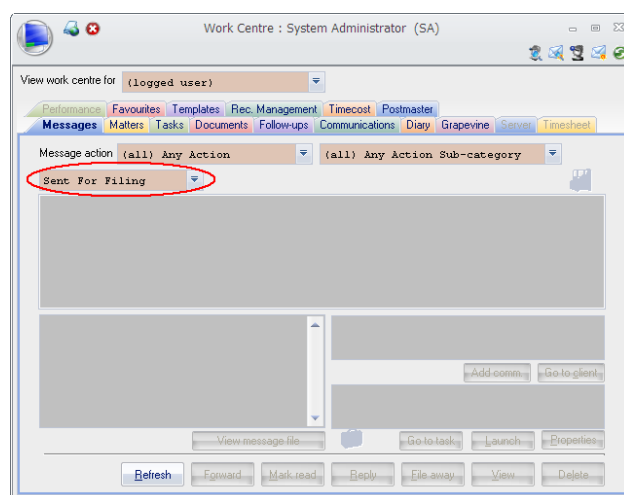
- ✚ In many cases, users may want to change a replacement symbols from one type to another. This can be done by deleting the old symbol and creating the new symbol which is a two step process. If the user specifies a different external identifier for the new replacement symbol from the old one, s/he will have to go through the document and change the replacement symbol inside the document. Hence users may want to avoid this by keeping the external identifier of the new symbol identical to the old one. The user may also want to keep the description identical too. Clearly, they can type these into the form but in cases where 10s or 100s of replacement symbols require conversion (maybe because of different configuration), this becomes a time consuming task. We have added a convert button to the replacement tab “**Replace**” of the document properties for this purpose. When clicked, the user will be prompted to select the type of the new replacement symbol and when selected, the proper form will be displayed containing the external identifier and description from the old replacement symbol. Please note that when clicking convert, you must select a different type for the new symbol. Selecting an identical replacement symbol type to the selected list entry will simply edit the entry rather than converting it. This process will change the type of the replacement symbol; hence if you had any list values

configured for the replacement symbol, they will all be deleted if you convert the symbol to a type that does not support list values.



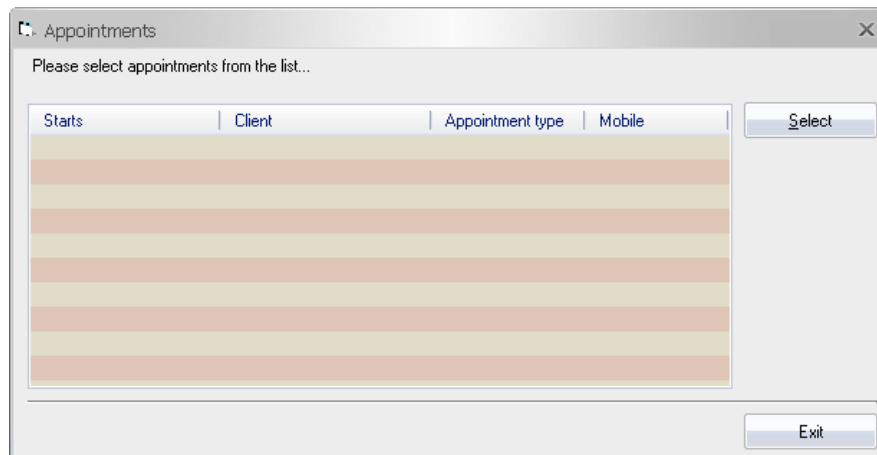
When reordering the replacement symbols in the list using “**Move up**” and “**Move down**” buttons, the actual reordering of the database records were done when the form’s save button was clicked. However, adding or editing symbols were refilling the list from the database hence the possibility of losing the replacement symbol order. We have modified this so that re-sequencing of the replacement symbols are done when the move buttons are clicked. That way, the order will always be preserved. Please note that when adding a new replacement symbol, the entry will be added to the end of the list. You can then use the sequencing buttons to move it to the correct position.

✚ In previous versions, we introduced the ability to send messages to filing clerk by dragging and dropping the selected messages from the message desktop to the “Send to filing clerk” button. In this version, we have extended this to emails dragged and dropped from Microsoft Outlook itself. Users can drag and drop emails from Outlook onto the send to filing clerk button and these emails will be imported and sent directly to the user’s filing clerk in one step. In addition to this extension, when a user has the “Send for filing” option selected from the message options drop down, drag and dropping Microsoft Outlook emails onto the message list box will perform the importation and route these messages to the filing clerk as if they are dropped onto the sent for filling button.



✚ We have amended bulk SMS to only allow selection of clients from the current and future appointments. This option will not be available when past appointments are being viewed. We have also changed the form that gets displayed to show the name of the client and their mobile telephone numbers as well. Please note that those

clients that do not have a mobile number will be displayed as ghosted and you will not be able to select them for SMS for obvious reasons.

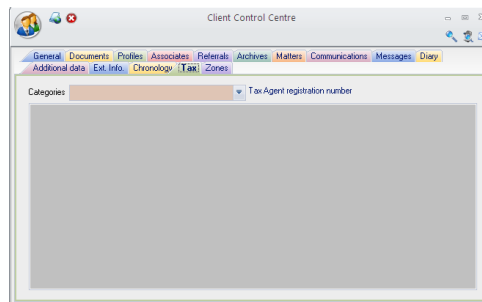


- When hosting outlook email in message form, it was displaying the outlook email for all message formats. We have amended this to display the outlook email only when RTF format is selected.
- In the tax tab of the Client Control Centre, the tax agent's registration number from Elite will be displayed. This will assist site when they are dealing with Australian Tax Office since they often require registration number for electronic lodgements etc.
- The Workflow form was not auto-finalising the imported/scanned documents. The difficulty in doing this as part of the workflow form was the possibly of replicating a workflow for a scanned/imported document. When replicating, the document attributes could change and clients and tasks could be added to the document. Consequently, auto-finalising a document as part of scan/import process would have meant that the document had to be reactivated before the replication can be done. We have changed this so that the identifier of the last scanned document is kept in memory. When a new document is scanned, the auto-finalisation of the previous document will be performed before the rest of the process continues.

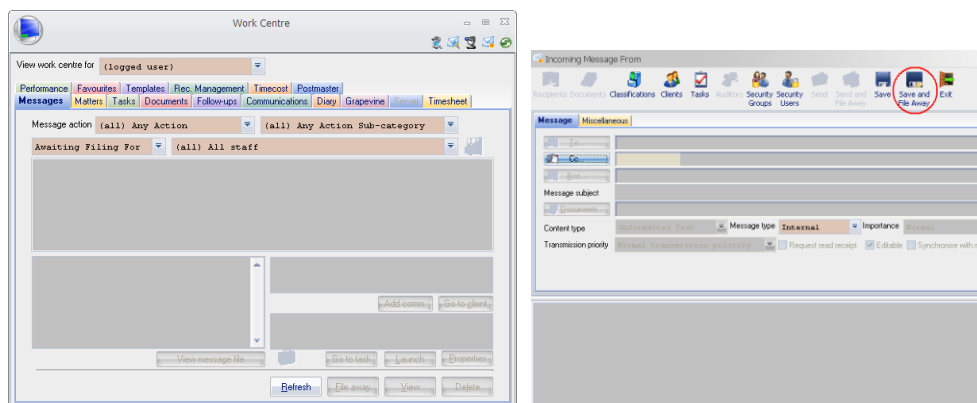




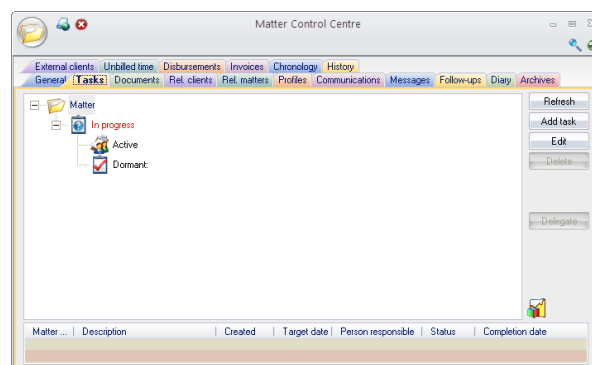
In the tax tab of the Client Control Centre, the tax agent's registration number from Elite will be displayed. This will assist site when they are dealing with Australian Tax Office since they often require registration number for electronic lodgements etc.



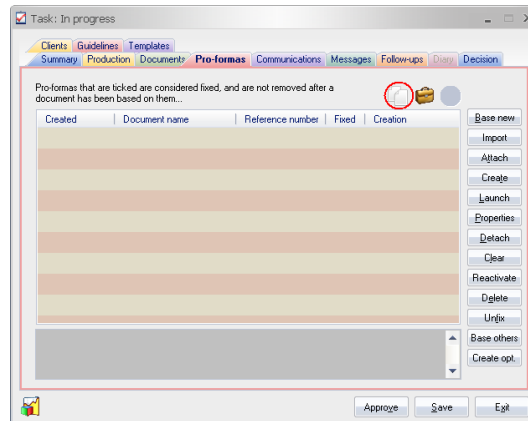
In the Workcentre, when a filing clerk was editing a message using “Awaiting Filing For” option from the dropdown, and then clicking the save and file away toolbar item, the file away part of the process was not considering the correct user for filing. It was using the currently logged user rather than the user that had sent the message to filing clerk. This has been corrected and the message will be filed away for the sender as well.



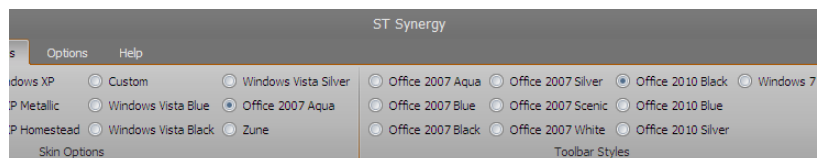
There was a bug in adding tasks manually to a matter. If users tried to add a task under a decision, Synergy was processing the decision and then adding the task as a dormant task under the decision. Because of the enhancements to the workflow questions and answers, it is now possible to put tasks on hold as part of making a decision. In those cases, it was possible to create on hold tasks under an active task which would not make sense. We have amended the code so that when users are adding tasks manually under a decision, the task is simply added as a dormant task without the decision being processed.



- ✚ A few versions back, we introduced a flag for profiles allowing them to be marked as speciality. There were some instances where this flag was not being updated properly from Client Control Centre, Profile edit form and the client group enquiry form. These are now fixed.
- ✚ In many occasions, a user may want to create a pro-forma based on another pro-forma. Noting that pro-formas are task related; documents will naturally be restricted for creation from within a task. In this case, it would be very difficult to duplicate these documents because there is no copy button in the pro-forma tab of the task edit form. We have added our document copy button to the pro-forma tab of the task form for this purpose.

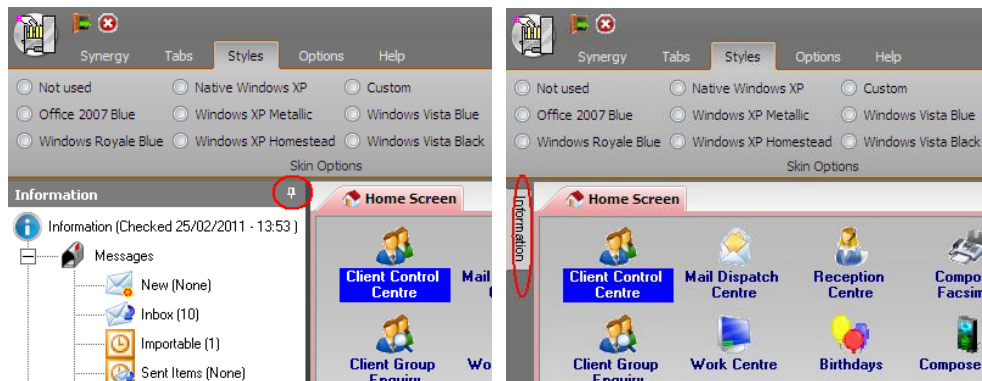


- ✚ Clicking the briefcase button in the pro-forma tab of the task form was copy all of the listed documents rather than the highlighted on. This is fixed.
- ✚ We discover some bugs in the new Software Development Kit features. These have been fixed on this release.
- ✚ When adding a new additional data row, all inactive columns were meant to be excluded from the additional data row. Software Development Kit was not considering this inactive flag when building additional data row. This is fixed on this release.
- ✚ When the timesheet entries were negative, the totals were not showing in the timesheet tab of the Workcentre. The negative times will now be deducted from the total figures. Display of these negative times has also been fixed.
- ✚ There was an error when editing a message from Matter Control Centre. This is fixed.
- ✚ This version of Synergy is compatible with “**Elite Enterprise Edition**“. The new Enterprise edition of the Elite will use Microsoft SQL Server database management system.
- ✚ Added Office 2010 and Windows 7 ribbon bar styles and Zune skin.

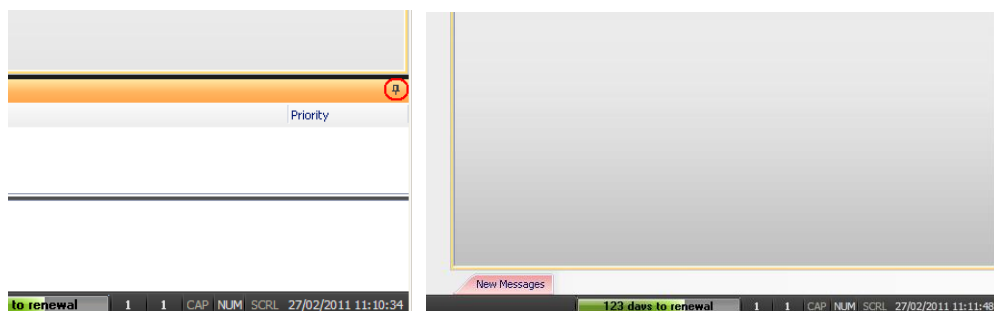


- ✚ We discovered that when new master matters are copied from existing ones; the client association setting of the decisions was not being copied from the master matter. This is fixed now.
- ✚ The contact details were not being saved for the follow-ups. This bug is fixed now.
- ✚ When displaying follow-up details in the Workcentre, if the follow-up does not contain any contact information, the details of the client for the follow-up will be displayed (work phone number).

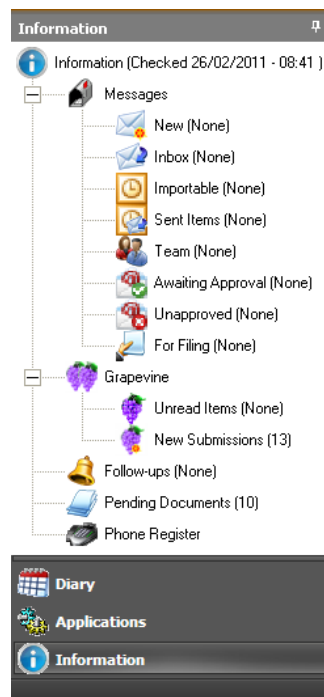
- Added ability to pin or unpin the information bar. When unpinned, the shortcut bar will appear as a tab on the left hand of the application.



- Allowed ability to pin or unpin message desktop. When unpinned, the message desktop will appear as a tab at the bottom of the application.

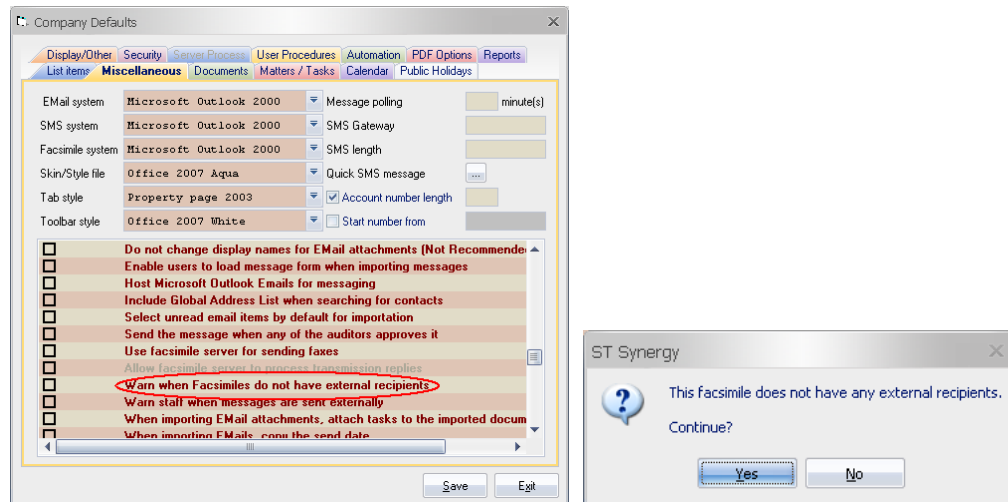


- The shortcut bar (information bar on the left) is now using the toolbar style selected from the styles menu rather than the old default of office 2007 blue style.

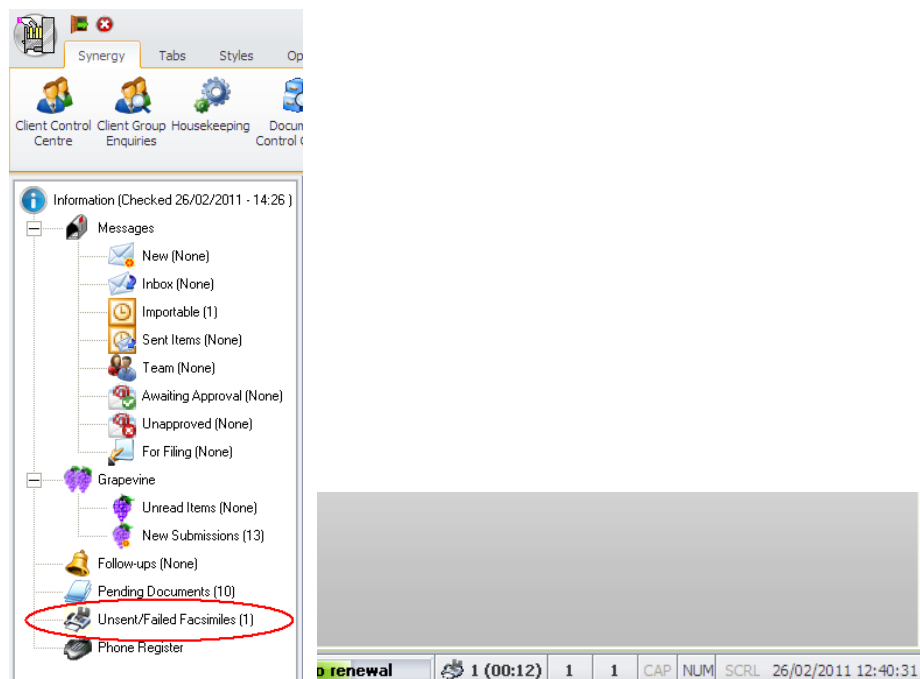


- When sites are using facsimile server, sometimes users forget to include an external fax recipient. This may cause a lot of problems when there are deadlines for faxes

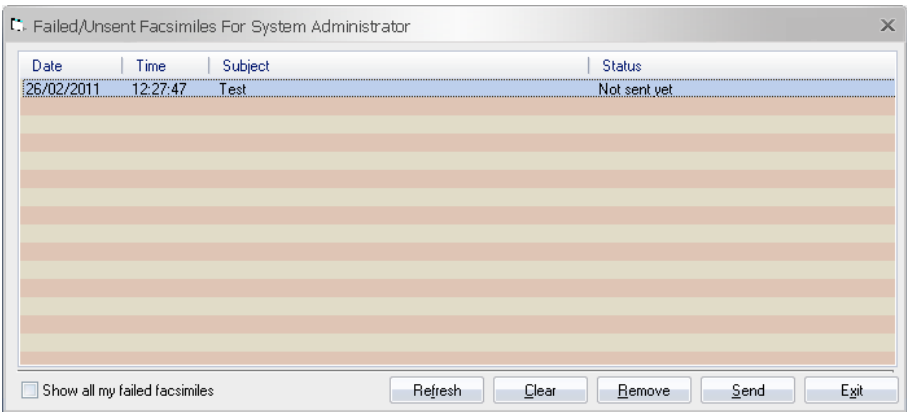
because in these cases, the fax will never be transmitted. We have placed a new setting in the company default that allows sites to let Synergy warn users that they have not included an external fax recipient. This setting is included in the messages section of the list box in the miscellaneous tab. With this option in place, faxes will be checked during the send process. If there are no external recipients, then Synergy will display a warning message and will only proceed if the user confirms that the fax does not need external recipient.



We have also included an icon in the application's status bar as well as the information shortcut bar that will display the number of unsent or failed faxes for the current day. Both icons display the number of faxes but only the status bar icon displays the elapsed time (HH:MM) since the earliest fax was queued. Please note that these icons will only be displayed if sites are using our fax server and the current logged user has unsent or failed faxes in the system. These icons will be invisible in all other cases. The status icon will be made visible from the time a user queues a fax on the server until all faxes are successfully transmitted for the logged user. The shortcut bar icon will always be visible.



Users can then click on these icons to get a modal form with a list of faxes that are waiting in the queue or have failed.



User can then use the buttons available in this form to maintain their faxes. Using “**Show all my facsimiles**” check box, a user can list all his/her failed or unsent faxes in the system not just those for current day. Selecting remove or clear will remove the fax from the fax server queue while the actual fax will remain in the system. This form should hopefully empower users to keep a close eye on the status of their important faxes and ensure that they will take appropriate action in presence of fax modems problems or failures. In some cases, users send faxes by mistake to the wrong recipient. In the past, stopping such faxes from transmission was difficult because the users had to use the fax server interface to remove such faxes from the server queue. From this version, the user has a better chance of removing these faxes if s/he can get to the fax quickly.

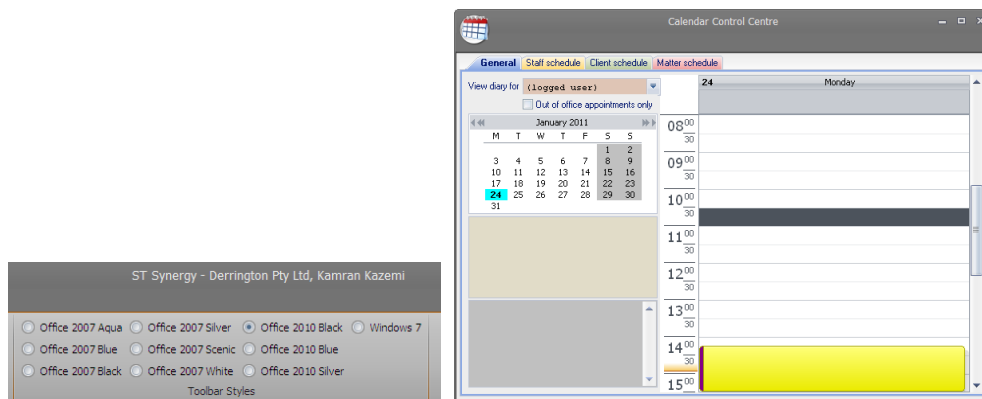
The status column descriptions and their meanings are as follows:

<b>Facsimile server not used</b>	This site is not configured to use Synergy faxing.
<b>Not sent yet</b>	The fax has been queued but the server has not dealt with this fax yet.
<b>Sent for transmission</b>	The fax server has processed this fax successfully and handed it to the Outlook for transmission. Outlook does not contain any replies from the fax modem yet.
<b>Successful Transmission</b>	Synergy has successfully handed the fax to Outlook and fax modem has successfully sent the fax to all its recipients. Synergy have processed the modem confirmation email and notified the sender of the fax in Synergy of the successful transmission.
<b>Transmission Failure</b>	Synergy has successfully handed the fax to Outlook but fax modem has failed to send the fax to all its recipients. Synergy have processed the modem confirmation email and notified the sender of the fax in Synergy of the failure of the transmission.
<b>Other Descriptions</b>	The description of other general failures that could occur during the fax processing. These include the failure to hook into Outlook application, general database errors stopping the server from accessing the details of the fax and tampering with the fax server database table manually.

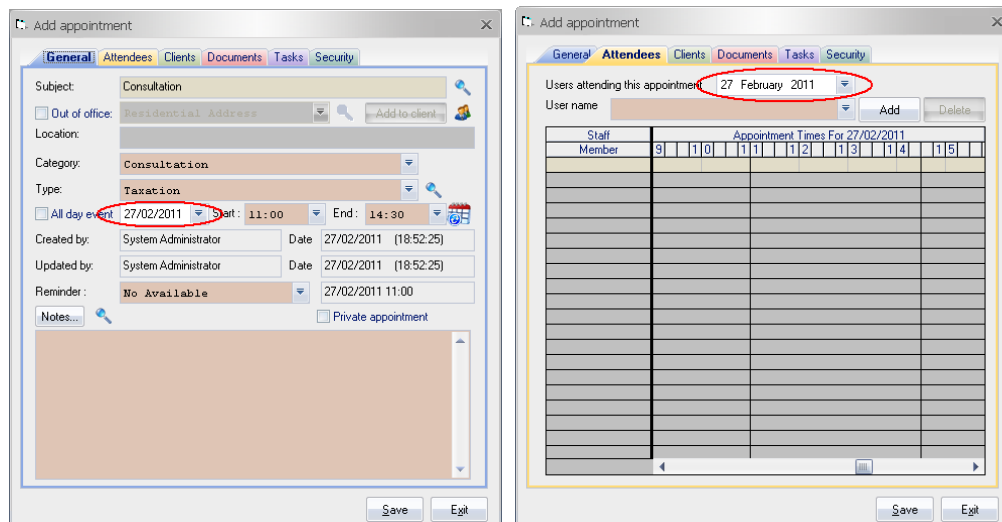
⊕ Synergy’s office and time costing system uses the system clock to work out the details for a timesheet entry. Unfortunately, given that Synergy cannot stop users from manipulating their system clock, when the system clock is turned back, it was

possible for timesheet entries to carry a negative time. We have placed validation in the time cost and timesheet forms to disallow saving of entries that have an end time before the start time. We have also altered the timesheet approval process to reject the timesheet entries that have negative time balance. When negative times are created in the system because of the system clock manipulation, the users will have to recreate the timesheet entries that have negative time entries.

The diary user interface was limited to 2003 and 2007 styles. We have removed the styles menu option from the diary popup menu and allowed this control to be synchronised with the toolbar styles selected from the ribbon bar.



When creating or modifying appointments, sometime users have to look through different dates to find a suitable time for the appointment. The attendee tab of the calendar form relies of the date picker on the general tab and this does make it hard to find a suitable time since the user has to go back and fort between the general tab and the attendee tab. In this version, we have added a date picker control to the attendee tab of the calendar form to make finding a suitable time easy. Please note that the form synchronises the two date picker controls.



When additional data is set to be information from a client, associate or indirect association, some time users may want the full address to be captured. Although these could be done as 5 different additional data fields, the process of collection them could be time consuming. We have added 5 new fields to the information list being the full client addresses. This will speed the process of data capture when full addresses are required. Please note that full addresses will only be visible for text and memo type additional data fields. When text data type is used, the address lines will

be separated by space where as for memo data types, they will separated by line breaks. The full address is formatted as follows:

Address line 1,  
Address line2,  
Suburb, State, PostCode  
Country

Description	Current value	Available
Work phone number area code		
Work telephone country code		
Work telephone number		
Client display name		
Date 1		
Date 2		
Date 3		
Date 4		
Last update date		
Time of last update		
Use first name, surname instead of title		
Work Extension		
World Wide Web address		
Year/Grade at school		
Full postal address		
Full business address		
Full registered office address		
Full residential address		
Full other address address		

In some sites, users may have to confirm diary appointments via emails immediately following the booking. In the past, this had to be done manually as a separate process. In this version, we have added a new button to the appointment edit form that allows users to save the appointment details and once saved, start the email form allowing them to compose the confirmation email. Please note that Synergy will create a default message content with the name of the first client from the primary client list and the date and time of the appointment and a list of attendees.

Subject: Residential Address

Location:

Category: Consultation

Type: Taxation

01/03/2011 Start: 10:00 End: 12:30

Created by: System Administrator Date: 01/03/2011 (13:42:49)

Updated by: System Administrator Date: 01/03/2011 (13:42:49)

Reminder: No Available 01/03/2011 10:00

Notes:

Private appointment

The following default message will be constructed and passed to the message form.

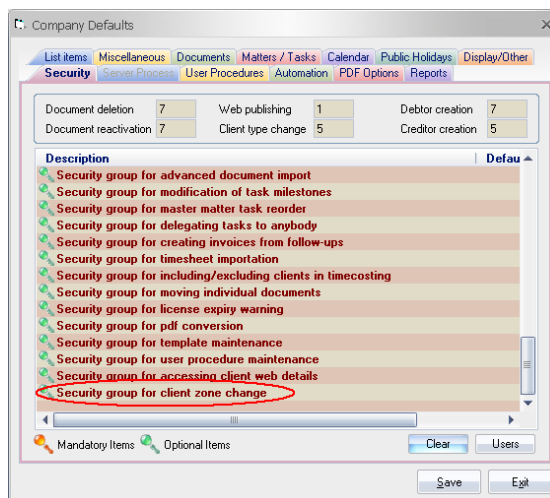
This is a confirmation Email that your appointment has been booked. Appointment details:

Booked for:  
Appointment date: 01/03/2011  
Start time: 10:00  
End time: 12:30  
Appointment with: John Smith

Please note that using message templates will overwrite this default message.



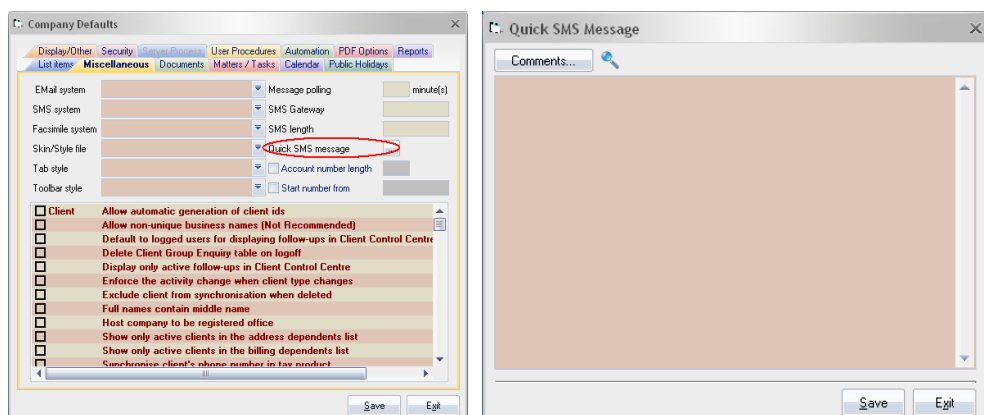
We have added a security group to allow restricting client zone changes. This is added to the security tab of the company default form. Please note that this security group only controls who can change the client zone. We still only allow housekeepers to allocate zones and territories to the staff member.



In the previous versions, when users were sending SMS messages from the diary tabs, the content of the SMS message was hardcoded in the application. We have allowed this content to be customised from the miscellaneous tab of the company defaults form. Following interpretation will be done for the stored content:

%AD% is replaced with appointment date,  
%AT% is replaced with the appointment time,  
%AL% is replaced with the location of the appointment,  
%AA% is replaced with the list of internal staff,  
%GN% is replaced with the client's given name  
%SN% is replaced with the client's surname  
%PN% is replaced with the client's preferred name  
%FN% is replaced with the client's title  
%IG% is replaced with the client's informal greeting  
%FG% is replaced with the client's formal greeting  
%CA% is replaced with the client's attention

Please note that if you place %AL% in the stored content, "our office" will be used if the appointment has no location. The maximum length of this message cannot exceed the SMS length specified in the form. Any message longer than this limit will be truncated.







In many cases, when users are booking appointments, they may have to quickly send a confirmation email to the person that is booking the appointment. Although this can be done manually from various section of the system, we have introduced a template selection dropdown in the calendar tab of the company default. This dropdown will list all of the message templates that are in the system and allows users to select one. “**Not required**” and “**Required (Allow message template selection)**” are two additional entries that will always be added to the dropdown. As the names suggest, when selecting the first entry, Synergy will behave as before and will not create an email after the appointment is booked. Selecting the second entry in the list will allow user to select a message template for email creation. Selecting any other entry will create an email and apply the selected template automatically to the email without prompting the user for template selection. Further more, we have allowed embedding of the SMS confirmation symbols mentioned above, in the body of the template and the application will replace these symbols at run time. Please note that creating email confirmation from the appointment form is the only place that interprets these symbols. Consequently, if you use the same template for creation of messages elsewhere, these symbols will remain in the body of the email.

Company Defaults

Security General Defaults User Procedures Automation PDF Options Reports

List Items Miscellaneous Documents Matters / Tasks **Calendar** Public Holidays Display/Other

Accepted Appointment Background Colour: [Green]

Appointment interval: Display Half Hourly Increment [x] Allow private appointments

External diary: Microsoft Outlook 2000

Weekdays: [x] Sunday [x] Monday [x] Tuesday [x] Wednesday [x] Thursday [x] Friday [x] Saturday

Working hours: Start 08:00 End 17:00 Starting day for week numbers: 1 July

Blank appoint. description: Available for booking

Confirm client appointments: Booking Confirmation

Not required  
Required (Allow message template selection)  
Booking Confirmation  
Client attendance to meet at our office  
Client followup with documents  
Client info re existing investment strategy  
Client info re new invest. strategy sent to office  
Client information required / outstanding

Save Exit

When email confirmation is configured, the system will automatically create the email and allow user to send it. However, when appointments are being modified, the user has to determine if a confirmation message is required and if so, use the new button called “**Save and confirm**” to achieve this. We have also made the location entry field available all the time rather than linking it to the “**Out of office**” checkbox because in many offices, there are various meeting rooms and users may want to indicate which meeting room will be used.

Edit appointment

General Attendees Clients Documents Tasks Security

Subject: [Residential Address] [Add to client]

Out of office: [x]

Location: [ ]

Category: Consultation

Type: Taxation

All day event: [x] 01/03/2011 Start: 10:30 End: 19:00

Created by: System Administrator Date: 01/03/2011 (13:19:45)

Updated by: System Administrator Date: 01/03/2011 (18:03:21)

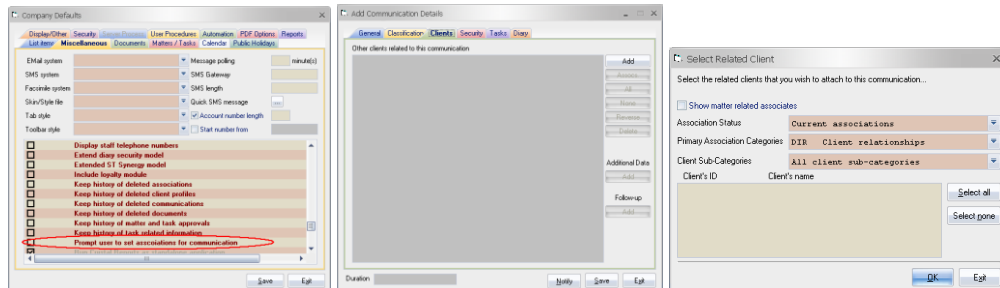
Reminder: No Available 01/03/2011 10:30

Notes: [ ] Private appointment

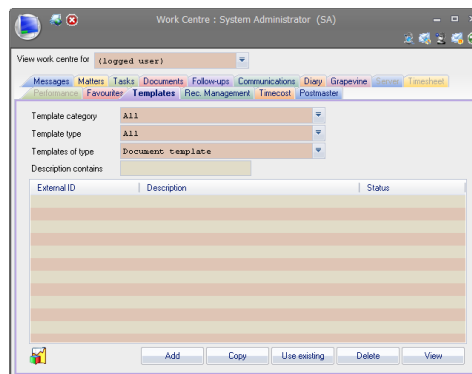
Save and confirm Save Exit



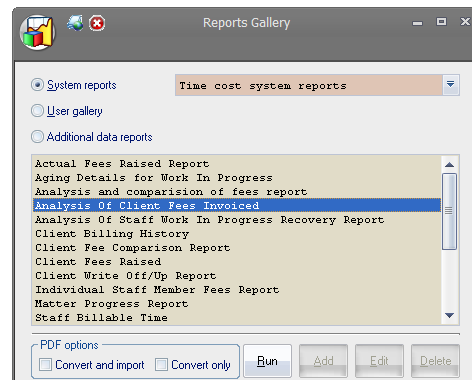
In some sites, users were forgetting to relate a communication to the associates of the primary client. To assist in capturing the related clients of a communication, we have introduced a housekeeper setting that allows a site to prompt for addition of the related clients to a communication. When this option is configured, Synergy will display the associates form automatically when new communications are saved and the client list is empty.



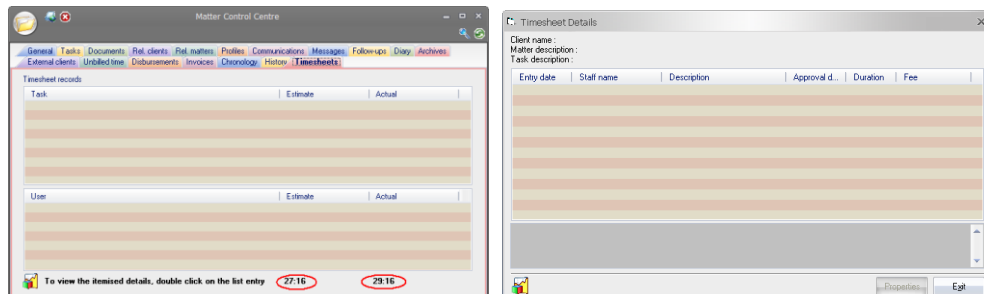
In cases where a site has too many templates, a user may want to quickly search the templates for those that contain some word or phrase. Although this can be done by sorting the templates list in the Workcentre and then scrolling to find the correct one, it would be much faster for the user to type the phrase or word and for Synergy to filter the list and only display the templates that contains the word or phrase. We have added a text box in the templates tab of the Workcentre for this purpose. Typing words and then pressing enter while the cursor is in this field will display only those templates that contain the word in their description. Users can use wild cards for this purpose. Clearing this entry field will display all templates as before.



We have added a new timecost report to the reports gallery. This report will attempt to provide information about client fees and their value to a practice. Please copy the ZZCLIFEE.RPT from the installation package to your system directory.



- We have added a timesheet tab that allows users to look at all timesheet entries for a given matter. This is simply a display tab and no maintenance can be done from here. The list will include all timesheet entries for any task in the selected matter. Please note that approved and unapproved timesheet entries will all be displayed in this tab. Double clicking the entries in the list, will display detailed view of the selected entry. The total estimate and actual times will be display at the bottom as indicated below.



Please remember to copy the two ZZMATTME.RPT and ZZMATTSH.RPT from the installation package to your system directory.

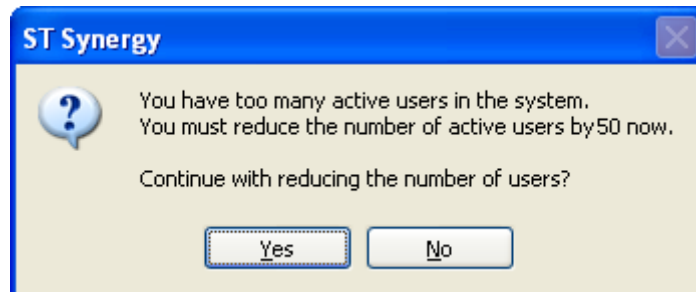
- When importing Emails, Synergy was not saving attachments with file name longer than 100 characters. This is fixed on this version. Please note that in these cases, only the first 100 characters of the file name will be saved in Synergy.
- When importing matters from a different database using the “**Import data**” button in the “**Support**” tab of the “**Housekeeping**” form, if Department that matter was attached to was not in the database, the users were getting an error saying that matter type does not exist in the database. We have changed the error message to indicate the real problem which is the fact that the Department is not in the database.



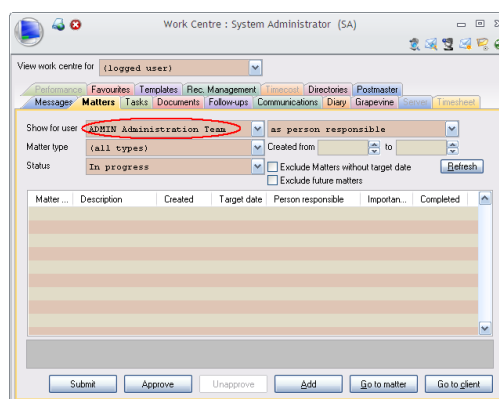
- Double clicking on the list in the client costing detail form will now close the form and load the selected matter in the Matter Control Centre similar to clicking the “**Go to matter**” button.



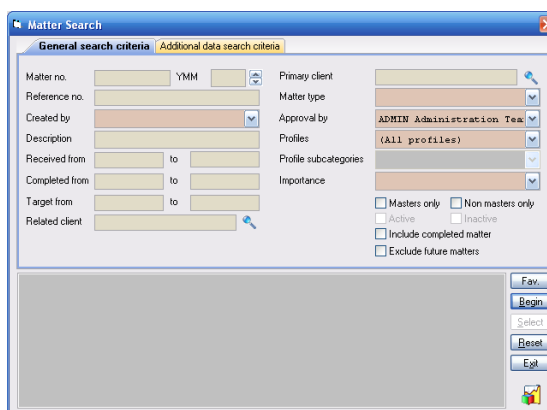
- ✚ Synergy was not checking for user license limit when users are activated/inactivated from the housekeeping. This had the consequence that a housekeeper could activate a user without knowing that the license limit is breached. This check is now done when the user selection form is closed from the housekeeping. The following message will be displayed if the license limit is breached.



- ✚ In previous versions, System Administrator could log in and test the Software Development Kit using the "SDK Test" button from the "Support" tab of the Housekeeping form. We have disallowed this from this version. Testing the Software Development Kit from Synergy, you need to be a housekeeper.
- ✚ In many cases, workflow matters are created on a team based environment. However, the matters tab of the workcentre did not list the teams in the user drop down. We have added the teams to this drop down.

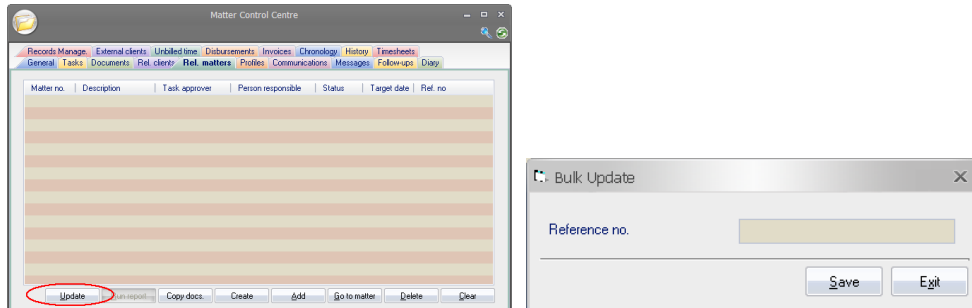


- ✚ Matter search form was not allowing search by teams in the approval by drop down. We have amended this to allow search by teams as the approver. It is highly unlikely that a team will create a matter and hence the reason for excluding teams from the created by drop down.

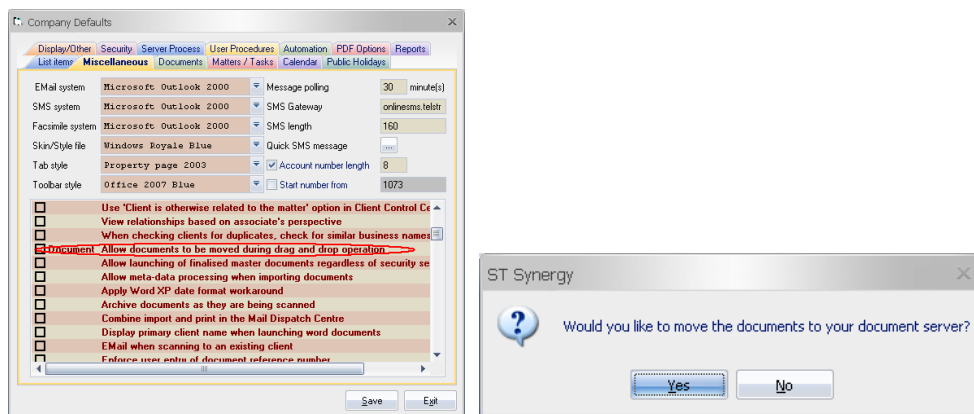




In the related matter tab of the Matter Control Centre, we have added an update button. This button allows matter reference number to be updated on the matter as well as the selected related matters. For now, reference number is the only updateable field but we may expand this in the future. A selection pop-up menu has also been added to the list in this tab.



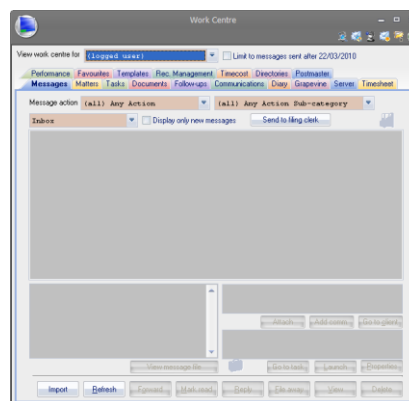
We have allowed documents to be moved rather than being copied during the file drag and drop operation. This can be turned on from the company defaults from housekeeping. When turned on, the user will get a message to confirm the move operation.



Also when users are allowed to save documents in their personal folder, drag and dropping more than one file were asking the user to confirm importation to his/her personal folder for each imported document. This is changed now to remember the user's answer and apply that to all of the imported files.

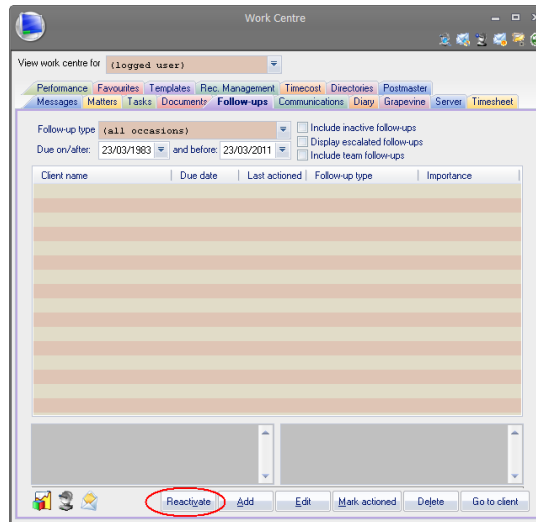


We have made the Workcentre completely resizable in height. Please note that the width is still fixed and the height cannot be less than the original height. The selected height will be remembered until the application is terminated.



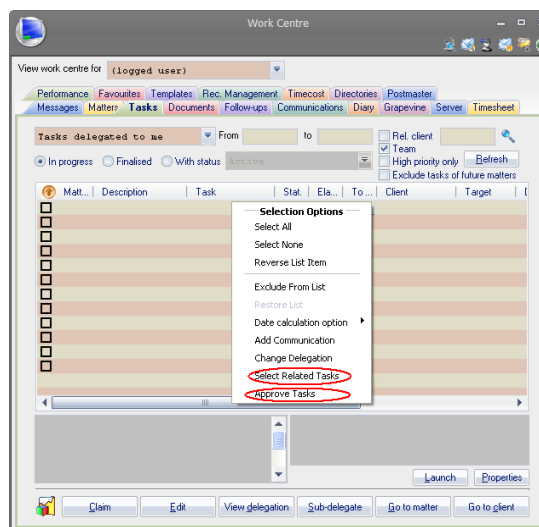


We have added a new reactivate button to the follow-up tab of the Workcentre. This new button will allow users to mark the selected follow-ups actioned and once the follow-up is actioned, reactivate the task if it is on hold. Please note that the task will only be processed if the follow-up is actioned. Reactivating tasks for recurring follow-ups is dependent on what the user does with the follow-up. If the follow-up is updated to recur again, then the on hold task will not be processed. Please note that list has been amended to have a check box to allow multiple selection. We have also added a selection pop-up to this list for easy selection of entries. We have also changed the “Mark actioned” button to allow bulk processing. So if a user selects multiple follow-ups and click this button, all the selected follow-ups will be actioned. If there are no entries checked, then the highlighted entry will be processed.

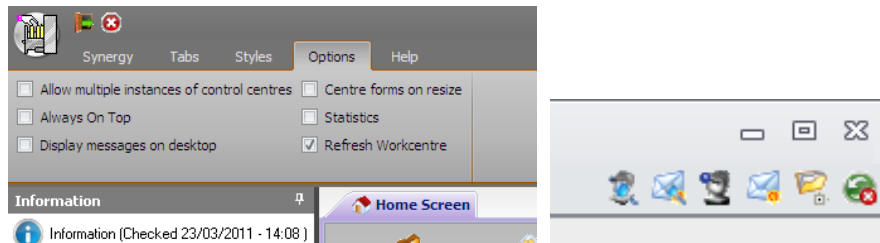


We have added two new menu options to the pop-up menu displayed from the task tab of the Workcentre called “Select Related Tasks” and “Approve Tasks”. The select related tasks option allows users to select a delegation or task and then check all of the task related to the checked tasks or delegation. Please note that relationship between the tasks or delegation is determined from the corresponding matters.

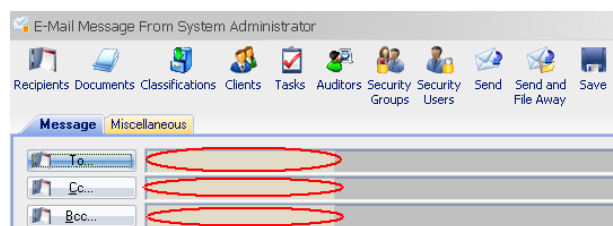
The second menu option allows users to approve the selected tasks from the list. Please note that task from will be loaded under the cover and all of the rules for the task approval will be checked before the task is approved.



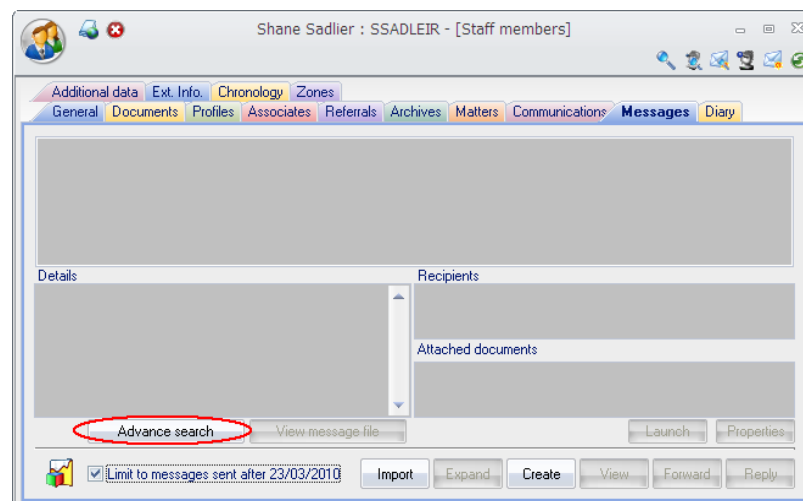
- ✚ We have added a new item to the options tab of the ribbon bar. This option allows users to turn the auto-refresh of the Workcentre on/off as they please. With this option off, the Workcentre will not be refreshed when tabs are switched. The Workcentre will also not refresh when it is activated by returning from other forms. When auto-refresh is turned off, the refresh icon on the ribbon bar of the Workcentre will have a red X indicating that auto-refresh is off.



- ✚ When composing emails, deleted attachments from the miscellaneous tab remained attached to the message despite it been removed from the user interface. This is fixed on this version.
- ✚ When typing in the search field of the To, Cc and Bcc fields in the message form, it was not matching the typed string against the user external identifiers. From this version, the users with matching external identifiers will be considered for search.

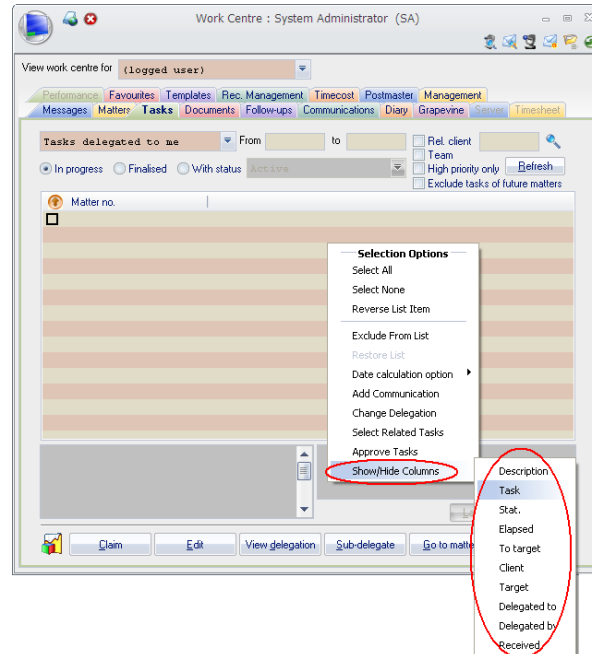


- ✚ Added an advanced search button to the messages tab of the Client Control Centre. When clicked, it will load the enquiry option of the workcentre and passes the selected client to the enquiry form.

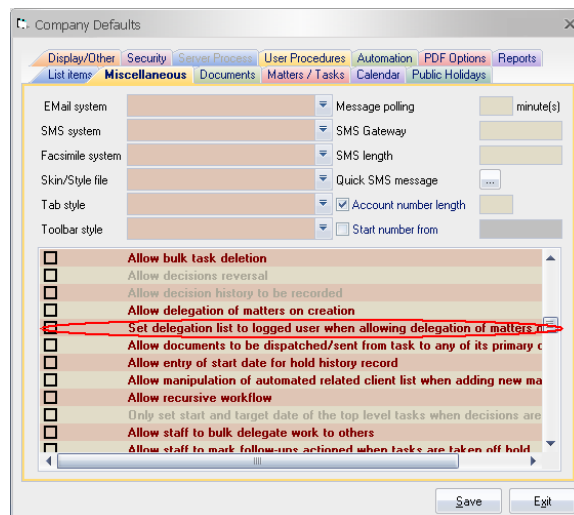


- ✚ In the task tab of the workcentre, users may want to see only certain columns rather than everything that is there. The user may also want to resize the columns and use the new resized column widths while the application is running. In this version we have allowed user to show/hide columns as well as resize them as they wish. Please note that these settings are only remembered in memory and while the application is

running. If you exit the application and restart it, the columns will all be displayed as before with their default widths. When hiding the columns, Synergy will make the column invisible by setting its width to zero. Users can make the column visible using column headers on the top of the list or the pop-up menu option. This is a global setting and will affect all workcentres if multiple centres are allowed.



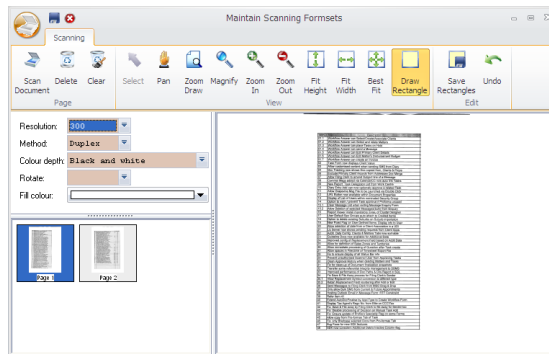
- When allowing delegations at the matter creation, in some case, administrators may want to default the delegated to drop down to the logged user. This was not possible in the previous versions. From this version, we have added a new setting in the company defaults for this.



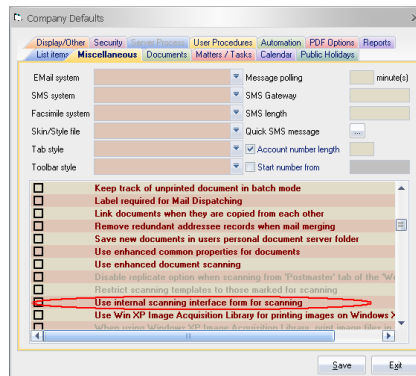
- Creating and modifying appointments were not using ExpressClickYes to avoid Outlook Security Guard. From this version onwards, appointment creation and modification will enable/disable ExpressClickYes as needed.
- We have developed a new interface for scanning documents through our OCR software. This new interface provides a more flexible approach in scanning documents. It allows scanned documents to be mixed in both resolution as well as the colour depth. For instance, one can scan a few pages in black and white with 200



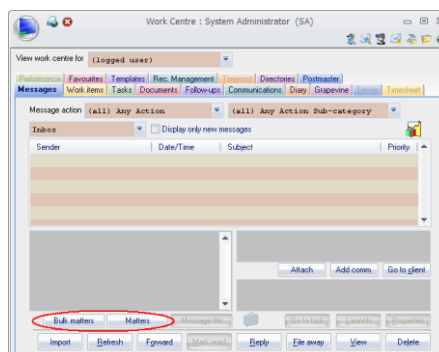
DPI and additional pages in colour at 600 DPI. We have also allowed users to obscure sensitive information from the scanned document by drawing a solid rectangle over the sensitive information. These rectangles, once applied, will become a permanent part of the document and hence completely remove the sensitive information from the document. We have also provided ability to rotate, move, or delete pages if needed. The moving of pages can be achieved by dragging the thumbnail images to the desired location.



To use this interface, we have placed an option in the company defaults. The default value for the new option is set to “False” allowing Synergy to behave identical to previous versions.



We have added two new buttons in the messages tab of the workcentre. The “Matters” button allows users to create a single matter for the selected message from the list. “Bulk matters” allows creation of matters in bulk for the selected message. The first option will bring the normal master matter selection form and allows user to create a matter.



The second option will display a new form that allows multiple matters to be created for the selected message. This form provides similar features to the workflow form.

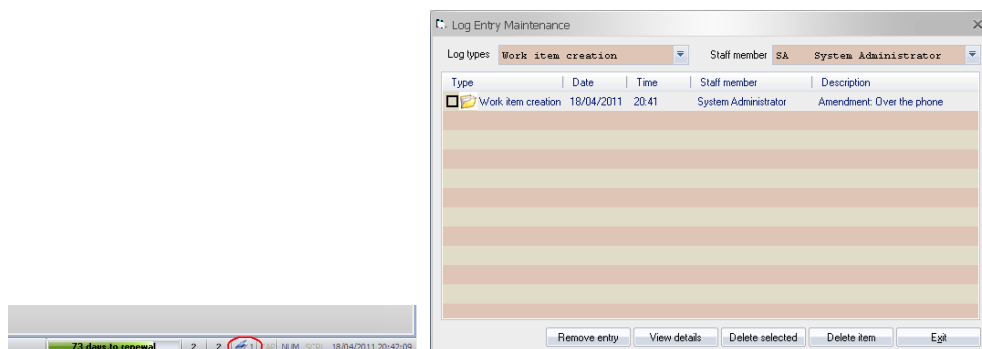
One major difference is that in this form, users can build a list of clients and create matters in bulk. The clients of the selected messages will be displayed in the client list initially. The user has the option of adding more clients to the list. Using templates you can narrow down to a specific master matter or select the matter selection button to select a specific master matter. Using “Import clients” button, users can add clients to the list from externally stored files. If the message has internal documents or contains external attachments, users can use the “Documents” or “Attachments” buttons to select a document or attachment from the selected message. The selected file then will be used for filling the client list. To remove, duplicate clients from the list, use the “Remove dup.” button. New matters can optionally be related to each other. This form does pretty much everything that workflow form does but for messages. The classification from the selected template will be added to the selected message. The selected message will be linked to the selected matters, primary client of the matter and all of the related clients of the matter. Auto-association can be used to ensure that enterprise wide auto-associates are added to the matters and eventually to the message.

Users can optionally send a message at the end of matter creation. The sender of the message will automatically be added to the list of recipients. However, the user can remove this if s/he wishes to do so.

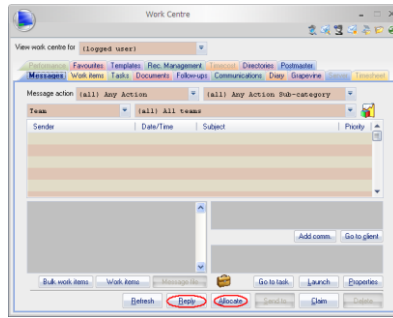


We have added some new popup menus option to the message form for creation of individual and bulk workflow. These menu items have been added to the client, document, task and attachment lists. We have also added follow-up creation options to the client and task list. Please note that creation of the matters will link the tasks, primary client and related clients to the message. The follow-up menu options will only be available when a client or task is selected.

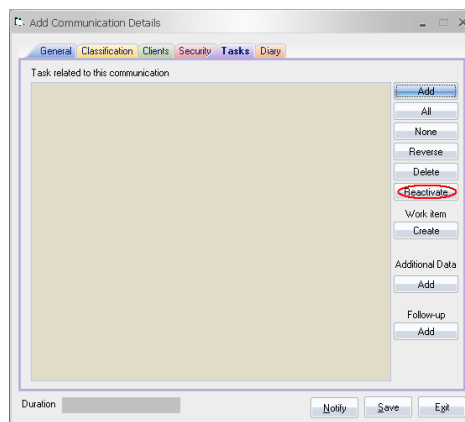
- ✚ We have amended the communication form. In cases where a client does not have a given name and surname, we now display the client title in “Their contact” field.
- ✚ In previous versions, from the general or task tab of the Matter Control Centre, users were unable to delete a matter while there were tasks attached to them even if they had the authority to bulk delete tasks. We have allowed matters to be deleted in these cases from those tabs. Please note that all matter validation will be done regardless of which method is used for deletion of matter.
- ✚ In the previous version, when users create a new ad-hoc task, document, matter or invoice, Synergy keeps a transaction log in a database table. The se log records are used to delete these entities when users bail out of the process. In some rare cases, the system could not delete these entries due to either system restriction. These logs were not processed in cases where the system were abnormally terminated either by the user or other means (power failure etc.). In the previous versions, only the system administrator had the ability to process these system logs manually. We have added a new button to the status bar of Synergy that allows users to inspect these system logs and clean them up at the end of the day if they wish to. Please inspect the entries before deleting the entries. If you are ever in doubt, just use the “Remove entry” button. This will leave the entity in the system and just remove the system log entry. Using the “Delete selected” multiple items could be deleted in bulk. Normal validation will take place before the item is deleted from the system. So if you are not authorised to delete a document, or a matter, this process will not allow you to delete it either. The number of entries in the system log table will always be displayed in the status bar icon. The icon will only be visible if there are system log entries for the logged user.



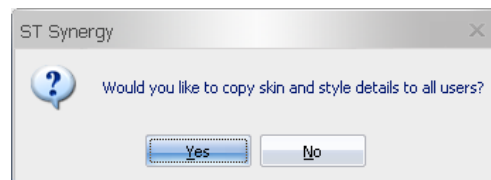
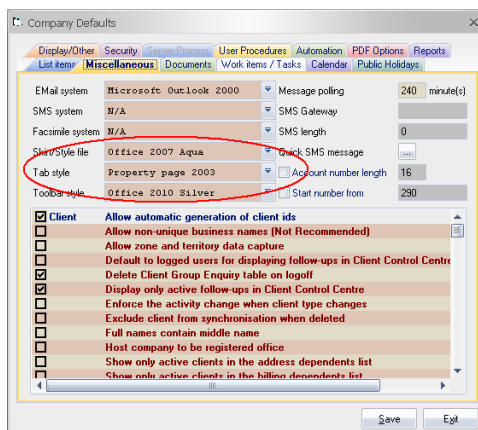
- ✚ Added two extra buttons “Reply” and “Allocate” to the messages tab of the workcentre for team option. The reply button will allow the user to claim the team based message and then reply to it in one step. The Allocate button allows a team leader to allocate multiple messages to their team members in one step. Please note that at this stage, Synergy does not have any facility to distinguish between a team leader and the team member. Consequently, any member of a team can allocate work to other members of the team. We will be extending Synergy to allow sites to specify who the team leaders are and then amend the system to only allow team leaders to do the allocation.



- Added a button to the task tab of the communication form to allow reactivation of tasks in bulk. The users can select multiple tasks and reactivate them in bulk from here. Please note that if you have not checked any entry, the highlighted entry will be processed. The system will go through the normal reactivation process that gets done from other areas of the application (you may see a number of messages as a result).



- Many sites may want a unique look and feel of the application in terms of the skin file, toolbar style and tab style. To set these up for every user may prove to be a little bit of extra work if there are too many users. From this version, we have allowed the system administrators to apply the changes done in this area to all users. When the details are changed, the user will be asked if s/he wants to apply these changes to user. A yes answer will apply changes to each user record in the system.



- Fixed a bug in cut and paste of tasks on master matters. In some instances, only tasks were being copied and delegations and other data were not. This is fixed on this release.

### Modification as at release 09.02.00

- ✚ We are extending our Software Development Kit library to include maintenance of clients and their associations. This version of the Software Development Kit contains the preliminary work on this. The Software Development Kit specification will be updated with the final release of the software. **Please be aware that this work is incomplete and subject to change without notice. Use the new objects and their features at your own risk. We may modify, rename, replace or even delete these new objects. The test application and the Software Development Kit test button from housekeeping contain preliminary examples of how this feature may work when released. DO NOT USE THEM UNTIL THEY ARE FORMALLY AVAILABLE.**
- ✚ We have started preparing our Software Development Kit for use by web applications. In order to achieve smooth integration with the web applications, we had to modify certain data structures. For example, we have replaced the standard VB6 “Collection” with a new class called clsSTSDKCollection. To keep the code change to a minimum, we have provided identical methods and properties in this class as the standard VB6 Collection. Where the Software Development Kit was returning VB6 Collection data type, it will now return clsSTSDKCollection data type. We hope to have sample c# code for our December release showing how the Software Development Kit can be used in a C# web application. Please note that to use the STSDKLib.DLL in a c# application, you will have to create the interoperable assemblies using the standard tlbimp.exe in Visual Studio and then include this new DLL in your c# application. Please also note that to use the Software Development Kit in web applications and allowing your clients to access information from Synergy database, you need to acquire proper licenses. Contact us should you wish to discuss this further.
- ✚ We have allowed estimated fee, actual fee. Workflow target date and workflow reference number to be passed to the Software Development Kit. The amounts will be used for any new matters that are created from the Software Development Kit if passed. If you are passing a target date, it will be used for the workflow itself not for the tasks. The target date must be on or after the creation date of the workflow.
- ✚ We have allowed sites to issue and store passwords for their clients. These passwords can then be used for authentication through the Software Development Kit Web login. Please note that a security group is set up and only staff that are part of the security group can access these fields.

The image contains two screenshots of software interfaces. The left screenshot is titled 'Company Defaults' and shows a 'Security' tab with a list of security groups. The right screenshot is titled 'Edit Staff members' and shows a 'Security' tab with various fields for client information and a 'Web Access' section.

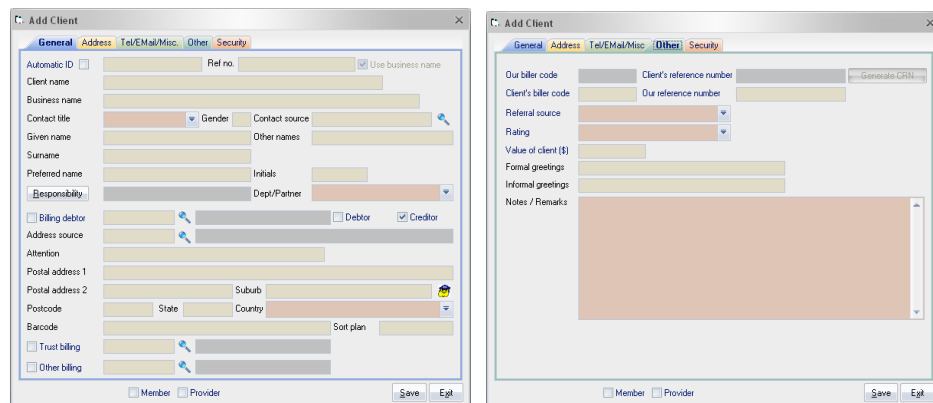
**Company Defaults - Security Tab**

Description
Security group for deleting approved disbursements
Security group for advanced document import
Security group for modification of task milestones
Security group for master matter task reorder
Security group for delegating tasks to anybody
Security group for creating invoices from follow-ups
Security group for timesheet importation
Security group for including/excluding clients in timecosting
Security group for moving individual documents
Security group for license expiry warning
Security group for pdf conversion
Security group for template maintenance
Security group for user procedure maintenance
<b>Security group for accessing client web details</b>

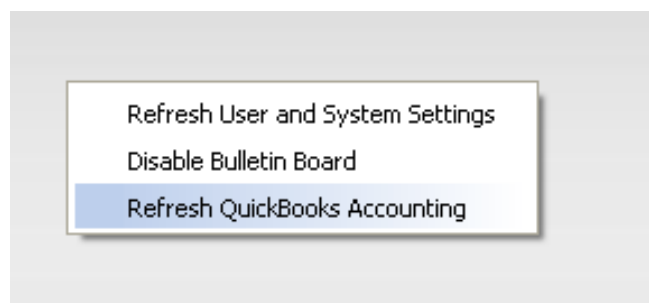
**Edit Staff members - Security Tab**

Field	Value
Our biller code	Client's reference number
Client's biller code	Our reference number
Referral source	
Rating	
Value of client (\$)	
Formal greetings	
Informal greetings	
Notes / Remarks	
Web Access	Start date End date

- ✚ The supplier BPay details were linked to the debtor check box rather than creditor check box in the client form. This is fixed now and the supplier BPay details can only be entered if the client is defined as a supplier.



- ✚ The validation of the encrypted data in the startup database was looking at the regional setting of the machine for date formatting. This was causing problems specially with the license server since the server may have a different regional setting to the clients. From this version, the validation of the encrypted data in the startup database is independent of the regional setting of the machine.
- ✚ On organisations that have QuickBooks or MYOB accounting links, the internal accounting objects are only created at the login time. In cases where the accounting server application is not running, the users will get a message notifying them that the server is not running. However, when the server application is restarted, the users had to log out and log back in for these internal objects to be recreated. We have added an option to the right mouse click pop-up menu from the home screen that allows recreating these internal accounting objects without having to log out and back in.



- ✚ Communications list on Matter Control Centre and Client Control Centre have been altered to remember the currently selected entry after a list refresh.
- ✚ Some bugs ironed out of the Reception Centre.
- ✚ We have allowed the user procedures document and URLs to be customised per matter and task type. Please note that the user procedure details for task type is used for the task edit form and the user procedure details for the matter types are used for the Matter Control Centre for now. Please note that you can still use matter and client account number symbols when specifying the Web Address at the matter or task type level. The processing order for the task form is as follows:

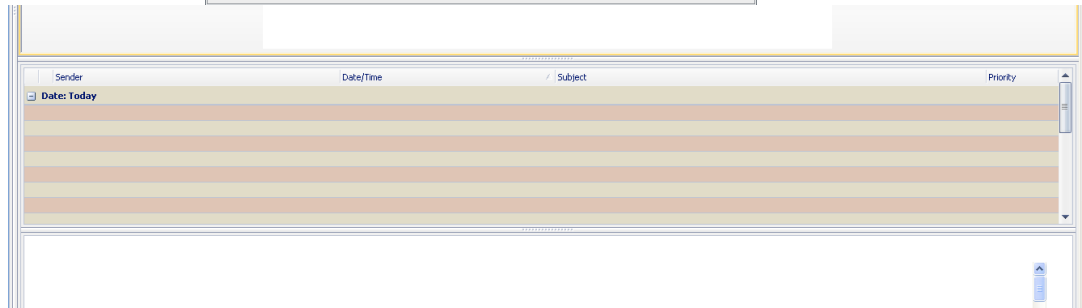
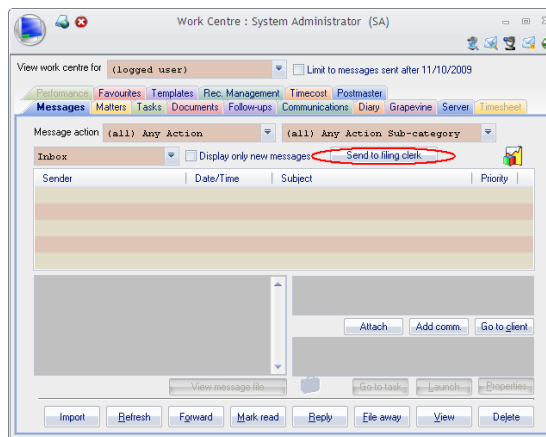
- 1) User procedure detail for the task type is the first to be used if exists.
- 2) User procedure detail for matter type is the next to be used if exists.
- 3) User procedure detail for the task form is the last one to be used.

For Matter Control Centre:

- 1) User procedure detail for matter type is the first to be used if exists.
- 2) User procedure detail for the MCC form is the last one to be used.

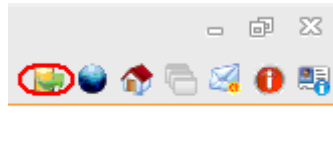
When Synergy is linked to Outlook as a Diary system, all appointments created in Synergy will be transferred to Outlook calendar. Synergy will add the identifier of the appointment in the subject line of the appointment prefixed with “**Appointment Key:**”. In order to synchronise any changes to the appointment in outlook calendar back into synergy, you should not delete or modify this key in any way. When appointments are changed in outlook calendar, a notification is usually sent to all attendees. We have added a new entry to the information bar that allows users to look at the appointment notifications and use these to change the appointment details in Synergy.

We have now allowed drag and drop from the Synergy’s Email desktop to the Workcentre messages list box and the “Send to filing clerk” command button. Dropping emails outlook emails (from inbox or sent items) will import the selected email. However, when the user drops the emails on the command button, the imported emails are directly routed to the logged user’s filing clerk. This effectively combines two processes into a single step.

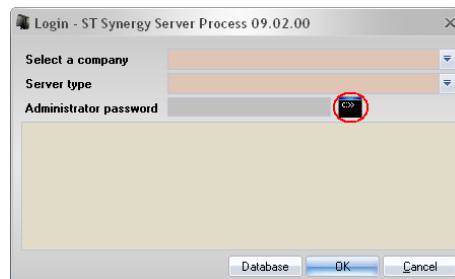


From time to time, a user may loose the connection to the database server. In these cases, the user may have to logoff and log back in to be reconnected to the database. In this version, we have added a new icon to the toolbar (on the top right) that could be useful in reconnecting the application to the company

database in many cases. You may want to try using this toolbar icon first before resorting to logging off and logging back in. Please note that this icon will only be available when the home screen is displayed.



- In many instances, the ST Synergy's server process will run on some sort of server machine and in some cases, the server Operating System may need to be restarted. For instance, when applying windows updates to a server at say midnight, depending on the nature of the update, the server may have to be restarted. In these cases, automating a restart of the Synergy Server application when the server machine is rebooted was not easily achieved. We have amended the server process and added a command button to the login form of the server process that will assist our user in automating a restart of any of the server applications without user intervention.



To force a restart of Synergy Server application, you will need to create a shortcut for every server application that needs to restart, specify the required parameters for the server application and then place it in the windows startup folder. Once this is done, on every reboot, all the necessary server applications will restart automatically without needing a user to enter the details manually. The above new button will assist you in getting the exact parameters that needs to be added to the shortcut. Just select the server type, company, the accounting server if applicable, and enter the correct password if required, and then click the button. This will encrypt the parameters and display the encrypted parameters in a standard message box. The content of the message box can be copied to windows clipboard using the standard Ctrl+C and then pasted into say notepad using the standard Ctrl+V key combinations. The reason for encryption is because of the fact that passwords have to be passed as part of the parameters. It will be unsafe to store the password in plain text because of obvious reasons. The parameters for all server apart from the license server and client synchronisation server have the following format:

/F "ST" 00XXXXX

1	2	3	4	5	6	7
---	---	---	---	---	---	---

Where:



1. indicates the server type,
2. is the identifier of the company in your start up database,
3. is the bit mask representing the days that server has to run,
4. is the start time for the server application,
5. is the user identifier for the system administrator,
6. is the Accounting System to use for QuickBooks and MYOB,
7. is the password that you have typed in the password field.

Please note that if you change these details in any shape or form, within your company database or in your start up database, you will have to correct the parameters on any shortcut that you have created. Otherwise, the servers may not start or operate on the wrong database at incorrect days and times.

⊕ A bug was discovered on Automation and document security server. When size was used to control the document server creation, it was not working properly. This was due to an arithmetic overflow caused by using a long integer to hold the total size of a folder. In this case, when the size of folder was larger than  $2^{31}$ , arithmetic overflow was not allowing the server to calculate the true size of the folder and hence, it was always assuming that the folder size is within the acceptable limit. This is fixed on this version.

⊕ Fixed a bug in workflow creation from Software Development Kit. It was possible for the last created workflow item to be left in the system depending on the nature of error. Please note that this bug will only effect those programs that are creating workflow in non-cached mode and do not wrap the workflow creation inside a transaction. If you have wrapped the workflow creation inside a transaction and rolled back the transaction upon failure, you should be fine.

## Modification as at release 09.01.01

- In the previous versions, users could specify the importance of a document or matter. From this version, we have extended the importance to follow-ups, communications and messages. In the past, there was a combo box in the message edit form that was called “Message importance”. This setting was only used for importance setting of the outlook messages that was being sent outside the organisation. We have changed its name to “Transmission priority” since that is the purpose of this setting. As part of the upgrade to V09.01.01, message importance will be defaulted based on transmission priority. The messages with the high transmission priority will be set to high importance, those with low priority will be set to low importance and those with normal priority will be set to none. The default for follow-ups and communications will be none.

The first screenshot shows the 'Add Follow-up' form with tabs for 'Client details', 'Date details', and 'Escalation'. It includes fields for Client ID, Client name, Type, Comments, and a list for Importance (None, Low, Normal, Medium, High, Critical). The second screenshot shows the 'Add Communication Details' form with tabs for 'General', 'Classification', 'Clients', 'Security', 'Tasks', and 'Diary'. It includes fields for Primary Client, Client name, Phone numbers, Reference no., Rating, Direction, Importance, Our contact, Their contact, Contact method, Phone numbers, Contact date, Start time, End time, and a Template. The third screenshot shows the 'E-Mail Message' form with a toolbar and tabs for 'Message' and 'Miscellaneous'. It includes fields for To, From, Cc, Bcc, Message subject, Content type, Message type, Importance, and Transmission priority.

- From this version, we have allowed the importance descriptions to be renamed for different entities like documents, matters etc. This can be done from the “Module descriptions” button from the Housekeeping form.

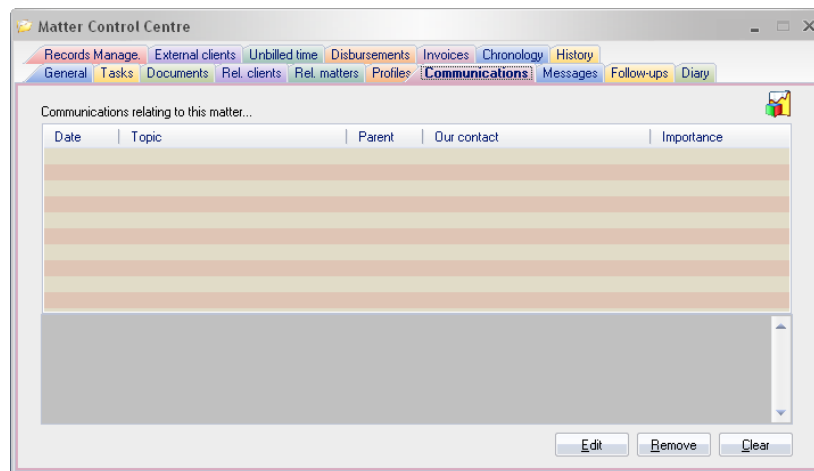
The screenshot shows the 'Customise Module Descriptions' form with tabs for 'Matters', 'Tasks', 'Loyalty', 'Clients', and 'Importance'. The 'Importance' tab is selected, showing a list of importance types (None, Low, Normal, Medium, High, Critical) and their corresponding descriptions (Communication importance, Document importance, Follow-up importance, Matter importance, Message importance). The form includes an 'Edit' button and an 'OK' button.

- Communication and message templates can now store the default importance. The importance will be copied from the template when communications and messages are created from the template.

- We have added the importance to the communication and follow-up tabs of the Workcentre.

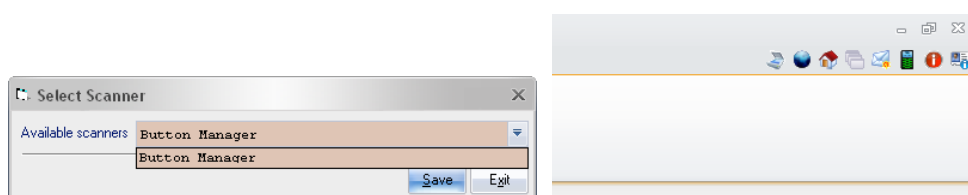
- We have added the importance to the communication and message tab of the Client Control Centre.

- ✚ We have added the importance to the communication, follow-up and message tab of the Matter Control Centre and changed the list view allowing sort feature.

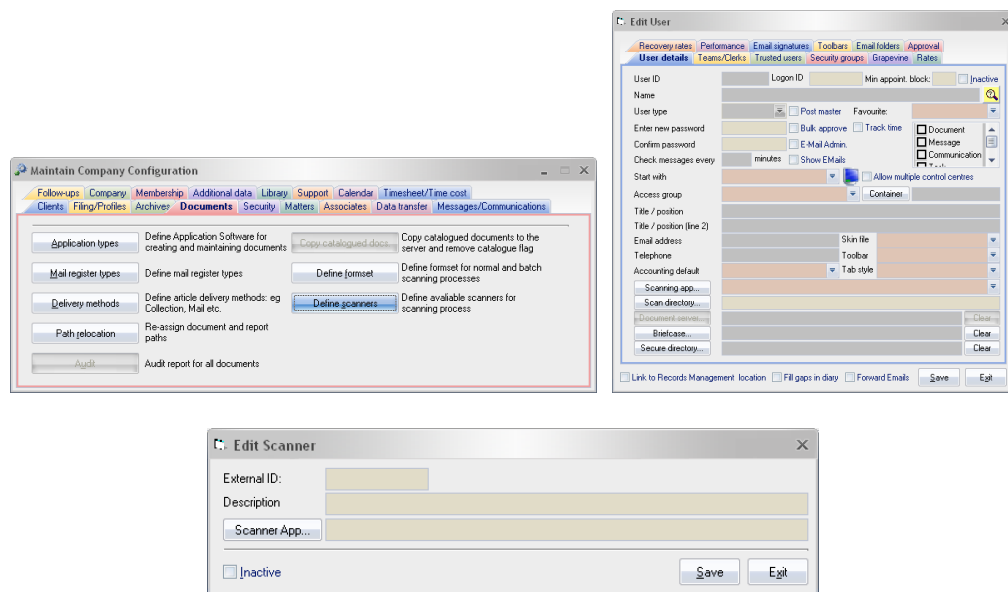


- ✚ Synergy allows organisations to store a single default scanning application for a user. In many organisations, there are multiple scanners and depending on which computer the user is logged on, they may want to scan using a different scanning application. In previous versions of Synergy, this was not possible. In this version we have allowed organisations to define all of the scanners and scanning applications that are available for users from housekeeping form. They then can link a user to a scanner and allow the user to use that scanning application by default. In this version, when a user logs on to Synergy, a quick check is done to ensure that the default scanning application is installed on the user's computer. If the default scanning application is not available, then Synergy will look at the defined scanners and determine which scanning application is installed. Once this is done, a list of these scanning applications will be presented to the user to select from. Once the user selects a scanner, the selected scanner is cached and used for the entire session. The scanning application is only refreshed when the user logs out and then logs back in again or restarts the application. We have also placed a scanner icon on the top right hand side of the ribbon bar that allows users to change their scanner if there are more than one scanning application is installed on the user's computer. Please note that the scanner toolbar icon will only be visible if the following conditions are met:

- 1) The user is set to have a default scanning application.
- 2) The default scanning application is not installed on user's computer.
- 3) There are other scanning applications defined from housekeeping.
- 4) More than one scanning applications is installed on the user's computer.

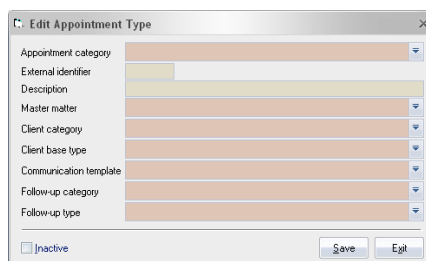


Scanners can be added from the document tab of the housekeeping or the scanning application button from the user edit form. As part of this upgrade, we have created the scanner entries from the user records and linked the users to these new entries. However, the upgrade will user “Scanner 1”, “Scanner 2” etc. as the scanner description. So you may want to review the description and external identifiers after the upgrade process and provide a meaningful description for the scanning applications.



✚ In many situations, when users are creating appointments, specially in call centres, they may want to create a new matter. Additionally, the client for the matter may not even be in the database, so users may have to add the client on the fly as well. Although both of these requirements can be done during the creation of the appointment using create client and matter buttons (in General and Tasks tab), the user has to click a few places to achieve this. It may also be required to record the phone conversation as a communication record as well as creating of a follow-up in the system.

In this version, we have allowed administrators to store a master matter identifier, a client category and type as well as a communication template and a follow-up type against the appointment types.



When appointments are created, these attributes are read for the appointment type and the following processes will take place before the diary appointment is saved (assuming all three attributes are added to the appointment type:

#### Client creation:

- 1) If there is any task in the task list, the primary client of the matter for the first entry in the list will be used and client creation step will be ignored.
- 2) If there is any client in the primary client list, the first client from this list will be used and client creation step will be ignored.
- 3) Otherwise, the client addition form will be displayed and the user can add the client to database.

#### Matter creation:

- 1) If there is any task in the task list, the first task from the list will be used and matter will not be created.
- 2) Otherwise a new matter will be created based on the master matter identifier and the first task from this newly created matter will be used. The primary client of the matter would be the client determined from the client creation step.

#### Communication creation:

Once the previous matter and client steps are completed, the communication form will be display for the user to record the communication using the stored template:

- 1) The client for the communication will be the client determined from the client creation step.
- 2) The task for the communication will be the task determined from the matter creation step.

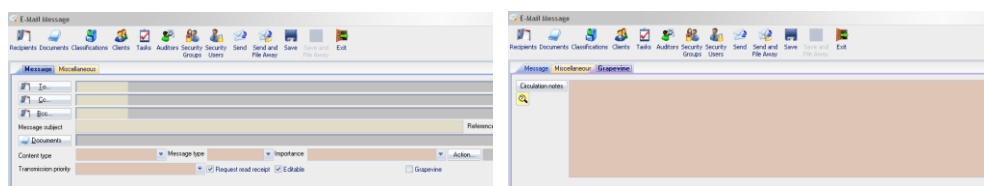
#### Follow-up creation:

Once the previous steps are completed, the follow-up creation form will be display for the user to create the follow-up with the specified type. Please note that Synergy will dynamically determine whether a client or task related follow-up is required. If the follow-up type is linked to both client and matter types, then the user will be asked to specify whether a client or task type follow-up is required. Client or the task will be passed to the follow-up creation form automatically.

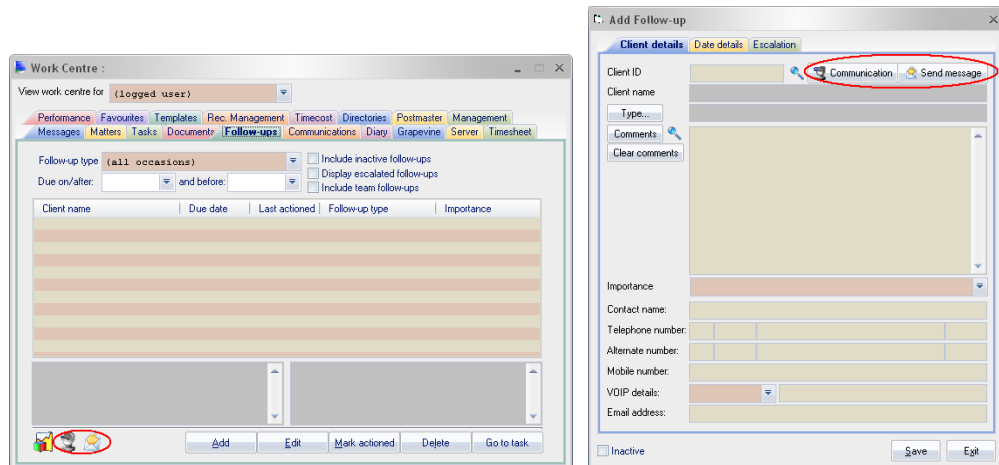
Please note that when creating new client and matter, these entities will be linked to the appointment that is being created. If the user exists from the client or matter creation forms, the process will not proceed. In this case, the appointment will only be linked to entities that have been created.



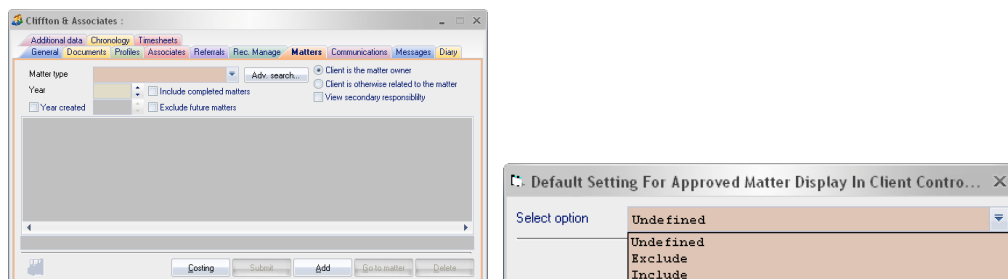
In this version, we have added the ability to publish messages in the grapevine. Please note that publishing messages in grapevine will be subject to the same rules as publishing documents and communications. This facility is only available from the message edit form.

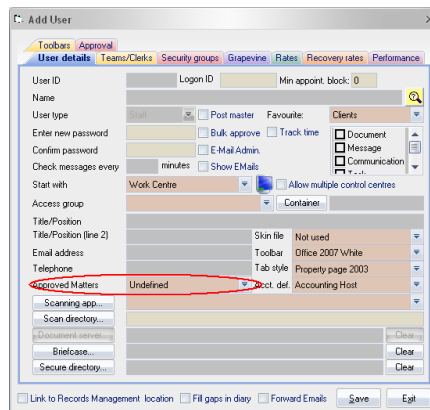
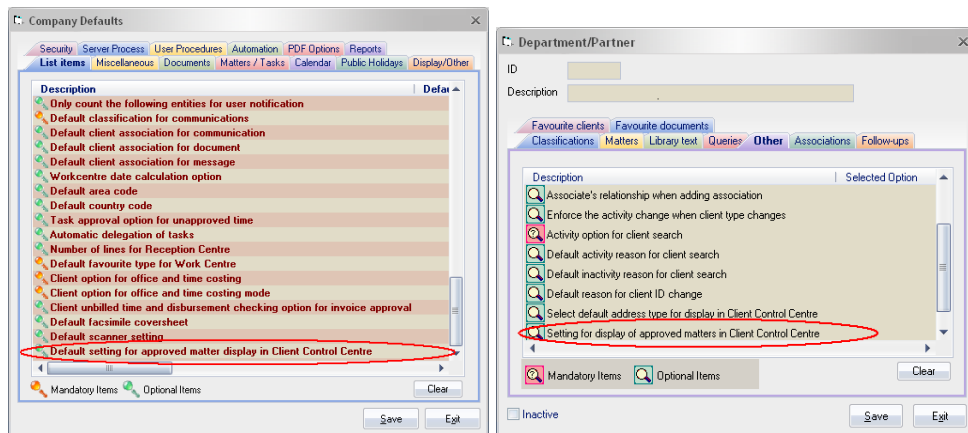


- In some instances, it may be necessary to send messages as a result of reviewing a follow up. We have added a message button to the follow-up form allowing users to create a message when reviewing follow-ups. To make this even easier, we have added the communication and message creation buttons to the follow-up tab of the Workcentre. This way, the user does not need to actually open up the follow-up form if s/he knows that the communication or message needs to be created. We have also allowed users to use the two buttons when creating new follow-ups. Please note that the buttons will only be available after a client or task has been selected.

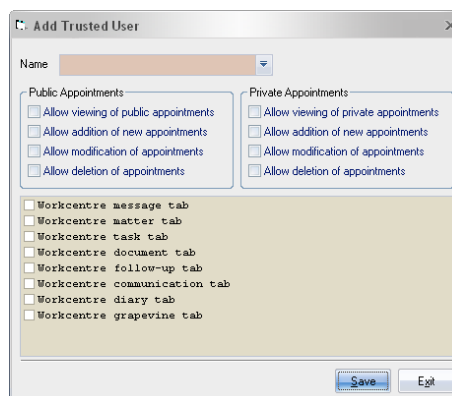


- The briefcase button on the messages tab of the workcentre was not enabled when the logged user was selecting messages with documents attached to it. This is fixed now.
- The server tab of the Workcentre was not displaying the correct server types based on the user privileges. This is fixed now. We have also added the ability to check the new MYOB accounting servers as well as the automation server on sites that are running it.
- We have added a new setting to the company defaults to allow users to specify whether the “Include completed matters” check box in the matters tab of the Client Control Centre should be checked by default. This is the company wide setting which can be overwritten at the Department and user levels. Please note the priority of these settings, user setting will take priority over the Department which in turn takes priority over the company wide setting. There are three options, “Include”, “Exclude” and “Undefine”. To use the lower priority options, set the higher priority option to “Undefine”. For example, to set a user to use the Departmental option, the “Undefine” option must be selected at the user level.



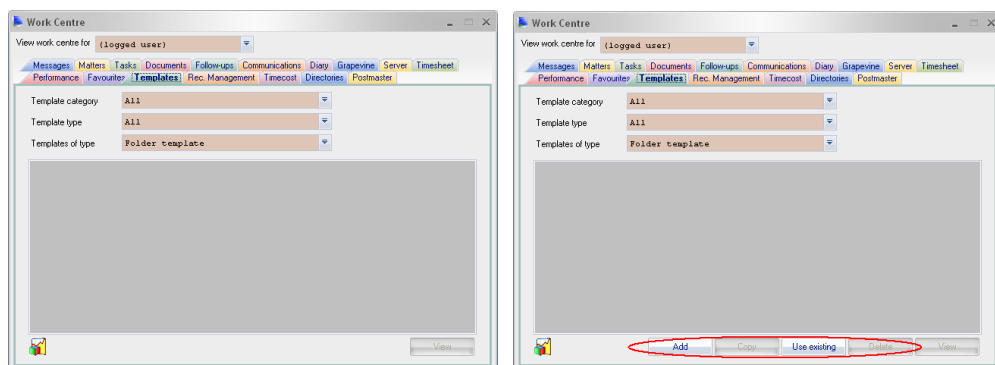
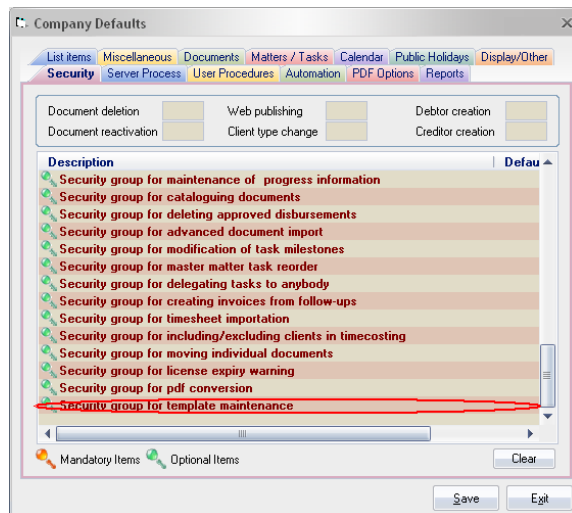


✚ In old versions, we had a Teledex tab in the Workcentre which was evolved into the favourites in later versions. However, when adding a trusted user, the Teledex was in the list of tabs. We have removed this entry from the list. We have also updated the bitmask in the database to reflect this change as part of upgrade to this version.

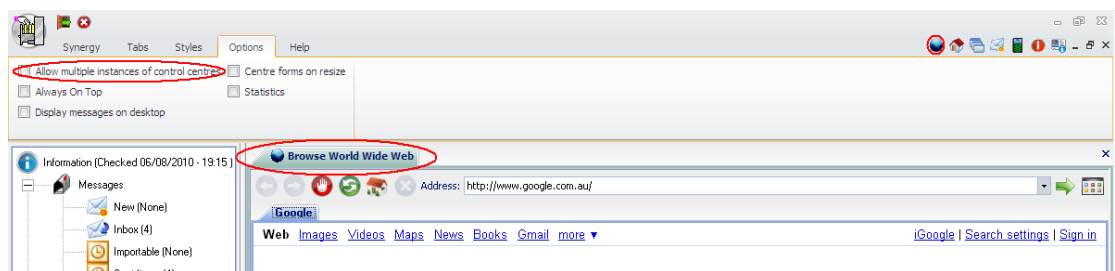


✚ We have added a new security group that allows sites to specify who are allowed to maintain the templates. Please note that this does not apply to the template maintenance from the housekeeping. This security group, for now, is used in the templates tab of the Workcentre and its use may be expanded in the future. Those users in this security group will get new buttons allowing them to maintain templates.

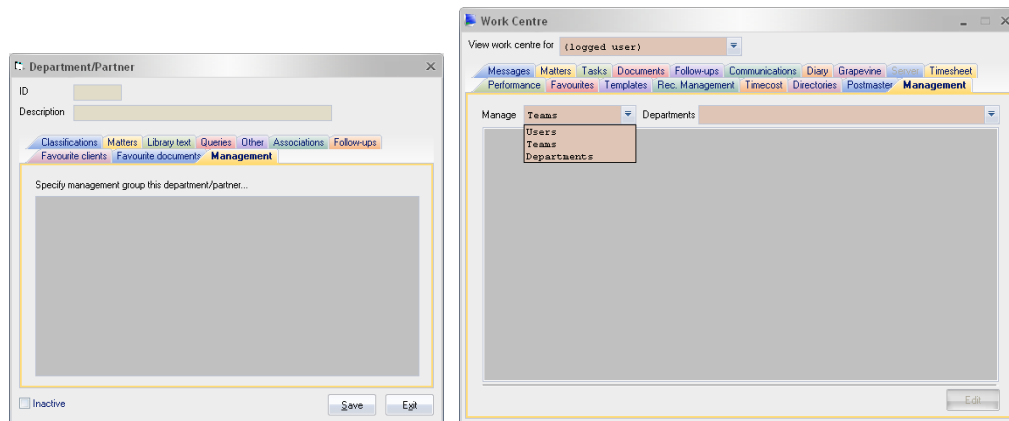




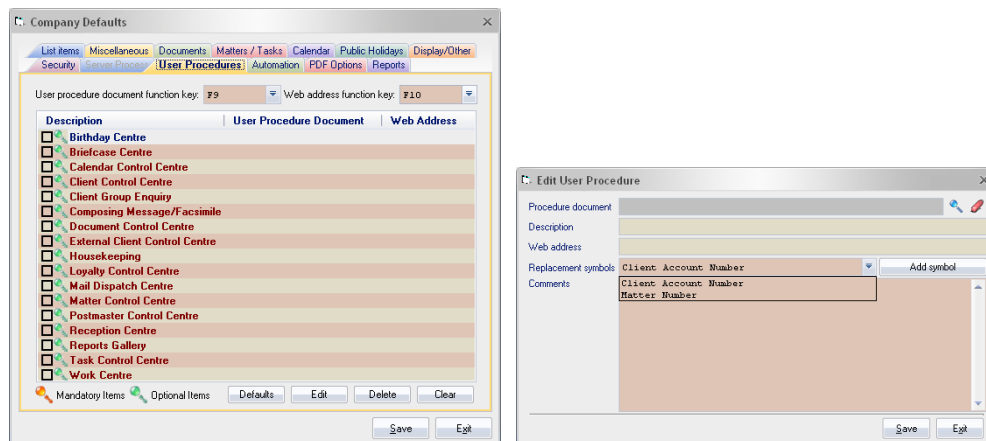
✚ In the previous versions, Synergy was considering “Allow multiple instances of control centres” setting when loading the internal web browser form. Given that the web browser form itself has the ability to display multiple browser tabs, we have decoupled this from the web browser form. From this version, there will always be at most one browser form displayed.



✚ We have allowed administrators to specify the list of users that are allowed to manage some limited information about the departments, teams and users. The list will be stored against a department when it is added or edited. These users will then see a new “Management” tab in their Workcentre. Using the features there, the users can maintain some information for the users in the department that they are responsible for.



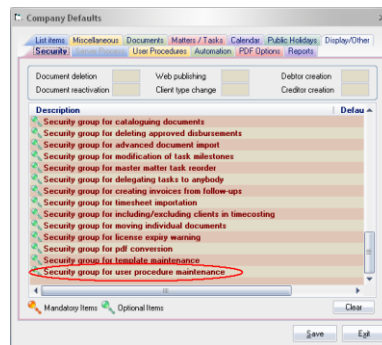
✚ In previous versions of Synergy, System Administrators could add user procedure guides to any form in the system. A function key were assigned from the company defaults form and used to achieve this. However, there were some inconsistencies in the way user procedures were handled. In this version, we have ensured that user procedure entries for predefined forms always remain in the system. We have also added the ability to store a Web Address in user procedure record in case organisations have their user procedure guides stored on their intranet or require users to quickly navigate from a form to a web address (please see above image). We have also provided for client account number and matter number substitution in the stored URL. This allows organisation to navigate to a web address and pass the matter number or client account number as a parameter in the URL string. Please note that Synergy's substitution will not add the parameter symbols to the URL. You must include the parameter symbol to the URL. Please also note that the URL string must start with "http://" or "https://".



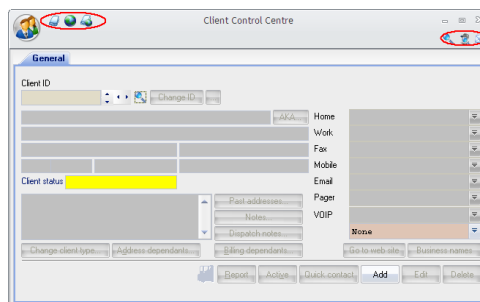
Given that we now have the ability to store an internal document as well as a URL as user procedure guide entry, we have allowed a separate function key to be bound for loading Web address as opposed to the document. This can be set from the "User Procedure" tab of the company defaults form as can be seen from the above image.

As stated earlier, System Administrators were the only users with the ability to maintain user procedure entries in previous versions. In this version, we have allowed this feature to be secured to a security group. Please note that only

those in this security group and the System Administrator will have the ability to use this feature.



Please note the following changes to our control centres.



All control centres will now display the quick access tool bar at the top left corner when the control centre has user procedure entity (either document or a web address) or the logged user is allowed to maintain the user procedure details for the control centre. The first icon is related to the user procedure document. It will be made visible only if the form is linked to a document. The middle icon is related to the user procedure web address. It will be made visible only if the form is linked to web address. The last icon is for maintenance of the user procedure and will only be displayed if the user has access to this feature through the security group.

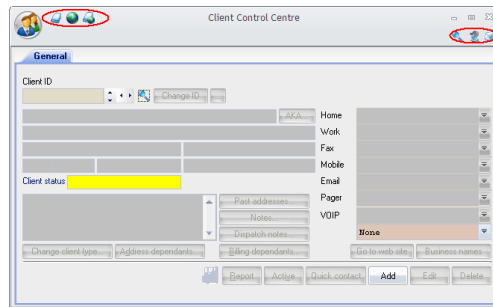
In some control centres with a tab control, there may be additional toolbar icons on the top right hand side which may be different for different control centres. These toolbar icons provide quick access for creation of certain information in the system. All these icons will have tooltip text providing users information about their functionality.



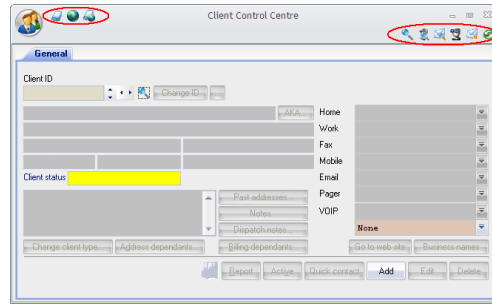
We have added the following function to the Client Control Centre via the control centre toolbar icons:

- 1) Ability to search for client from any tab in the centre using the search icon. Using this icon, when the user selects the client for display, the general tab will be displayed with the details of the new client.
- 2) Ability to search for a client and then create a communication for the newly selected client regardless of which tab is currently displayed.
- 3) Ability to search for a client and then create a message for the newly selected client regardless of which tab is currently displayed.

- 4) Ability to create a communication regardless of which tab is currently displayed. Please note that this toolbar icon will only be visible if a client is already selected. Otherwise, this toolbar icon will be invisible.
- 5) Ability to create a message regardless of which tab is currently displayed. Please note that this toolbar icon will only be visible if a client is already selected. Otherwise, this toolbar icon will be invisible.
- 6) Ability to refresh the currently displayed tab. Please note that this toolbar icon will only be visible if a client is already selected. Otherwise, this toolbar icon will be invisible.



CCC when there is no client selected



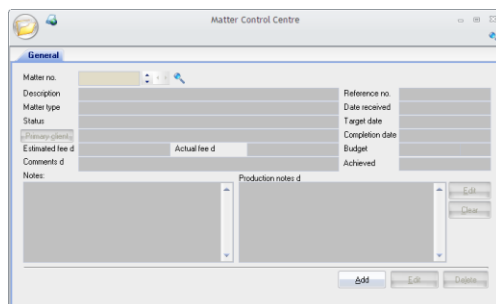
CCC when there is a client selected

These changes should hopefully improve user friendliness of the system.

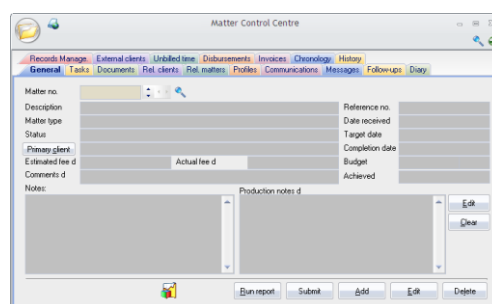


We have added the following function to the Matter Control Centre via the control centre toolbar icons:

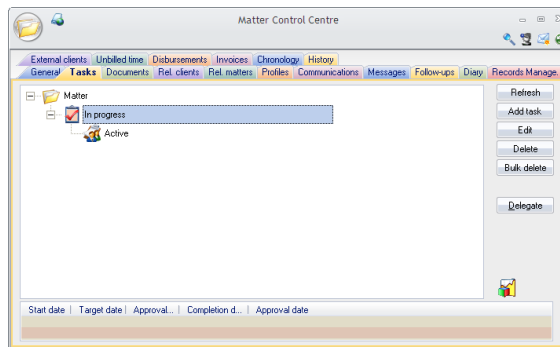
- 1) Ability to search for matter from any tab in the centre using the search icon. Using this icon, when the user selects the matter for display, the general tab will be displayed with the details of the new matter.
- 2) Ability to create communication when any active or on hold tasks is selected in the task tab.
- 3) Ability to create message when any active or on hold tasks is selected in the task tab.
- 4) Ability to refresh the currently displayed tab. Please note that this toolbar icon will only be visible if a matter is already selected. Otherwise, this toolbar icon will be invisible.



MCC when there is no matter selected



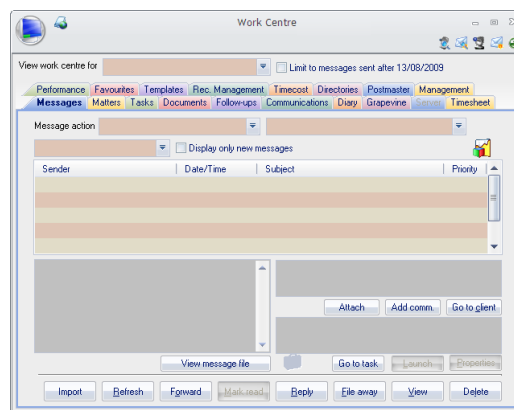
MCC when there is a matter selected



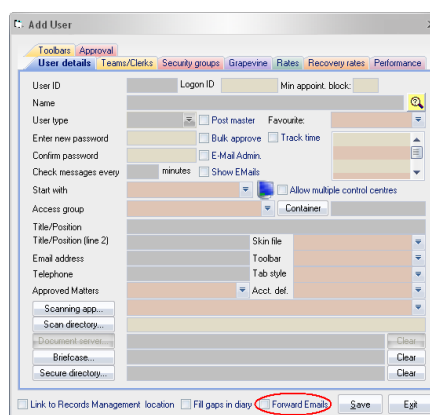
MCC when an active task is selected

✚ We have added the following functions to the Workcentre via the control centre toolbar icons:

- 1) Ability to search for a client and then create a communication.
- 2) Ability to search for a client and then create a message.
- 3) Ability to create a communication.
- 4) Ability to create a message.
- 5) Ability to refresh the currently displayed tab.



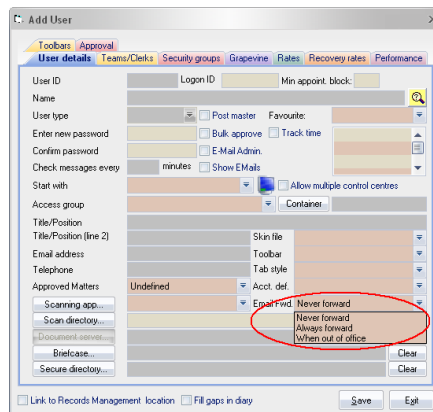
✚ In previous version, we introduced a setting at the user level called “Forward Emails”. This option provided ability to forward internally sent messages to a staff member’s external email address. This was useful for people that are often out of office and yet require receiving all their messages on their mobiles phones. This setting only allowed the feature to be turned on or off.



After some initial testing, we have replaced this on/off option with a more flexible approach. We have provided three options as follows for message forwarding:

- 1) Always forward as before.
- 2) Never forward as before.
- 3) Forward messages only when user is out of office.

With this third option in place, the system will look for an out of office appointment for the staff at the time a message is being sent. If it finds at least one out of office appointment which is not rejected, then the message is forwarded. Otherwise, it will remain in the system as an internal message. Synergy also allows organisations to warn a user when the messages are sent to any external recipients. However, this warning will be suppressed if these forwarded email addresses are the only external recipients of the message.

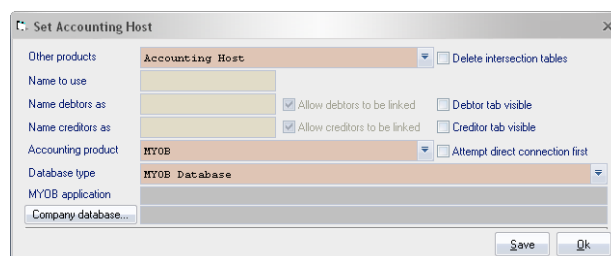


**Please note that the sender of the message must be defined as an Email Administrator for this feature to work, that is, s/he must have access to Microsoft Outlook.**

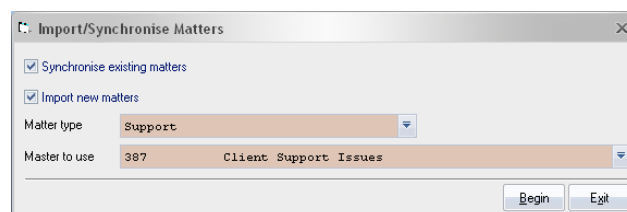
- ✚ In the previous versions, users could not create recurring appointments in the past. We have relaxed this rule and allowed recurring appointments to be created. However, modifications to a recurring appointment will only alter the future appointments.
- ✚ In rare occasions, the server tables for various server processes may not be cleaned up properly (e.g. power failure). In these cases, the server application does not get a chance to cleanup and then shutdown normally. When a user attempts to start a server after these situations, the Synergy server may falsely report that the requested server is already running. We have amended the server process to perform all the necessary clean up before filling the server type drop down in the login form.
- ✚ The Software Development Kit function “IsLicensed” was returning False in every case. It is fixed on this version.
- ✚ Briefcase icon in the grapevine tab was disabled when “All” option was selected from the display dropdown. This button is enabled for “All” option on this version.

**Modification as at release 09.01.00**

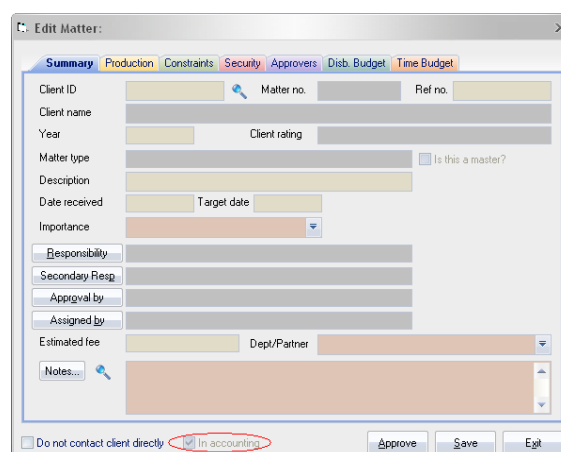
- ✚ **MYOB accounting system integration is completed.** Users can now synchronise their customers, suppliers and jobs with MYOB premier accounting system. If the system is configured to use time costing module, all invoices created within Synergy will also be added to MYOB as sales invoices. When using MYOB, the Synergy service codes must be matched with the account identifiers in MYOB and the Synergy tax codes must match the MYOB tax codes. Users can import their jobs from MYOB accounting if they wish to. Please note that for the jobs to be imported, they must be linked to customers in MYOB, those customers must be imported or exist and be linked to MYOB in Synergy. The MYOB ODBC driver does not allow updating of job numbers and hence the imported job numbers must not exist in Synergy. MYOB also allows non-numeric job numbers. Jobs with non-numeric job numbers will not be imported into the system. In some cases, the job may be deleted from the accounting system but the link may still exist in Synergy. This link will be broken for active matters when the edit form is loaded. In those cases, if the users wish to recreate the matter in MYOB, then use the provided check box to do so. To enable job integration, the matter types in Synergy must be allowed to be added to the accounting system. When this is done, matters are created automatically created in the accounting system as they are added to Synergy. No user intervention is required.



The 'Set Accounting Host' dialog box is used to configure the accounting system. It includes fields for 'Other products', 'Name to use', 'Name debtors as', 'Name creditors as', 'Accounting product', 'Database type', and 'MYOB application'. There are also checkboxes for 'Delete intersection tables', 'Allow debtors to be linked', 'Allow creditors to be linked', 'Debtor tab visible', 'Creditor tab visible', and 'Attempt direct connection first'. The 'Save' and 'Ok' buttons are at the bottom right.

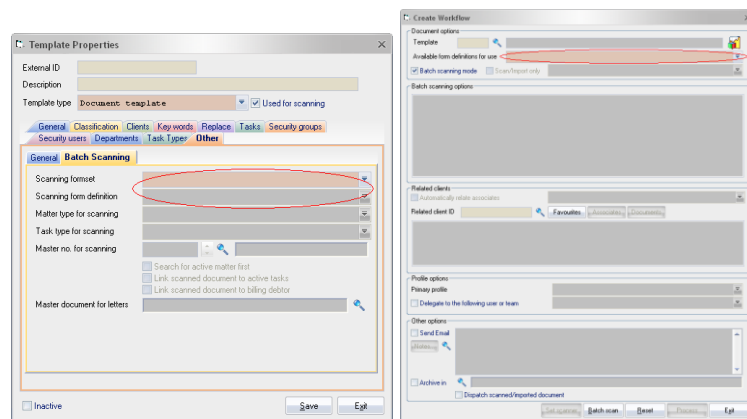


The 'Import/Synchronise Matters' dialog box is used to import or synchronise matters. It includes checkboxes for 'Synchronise existing matters' and 'Import new matters'. There is a 'Matter type' dropdown menu and a 'Master to use' dropdown menu. The 'Begin' and 'Exit' buttons are at the bottom right.

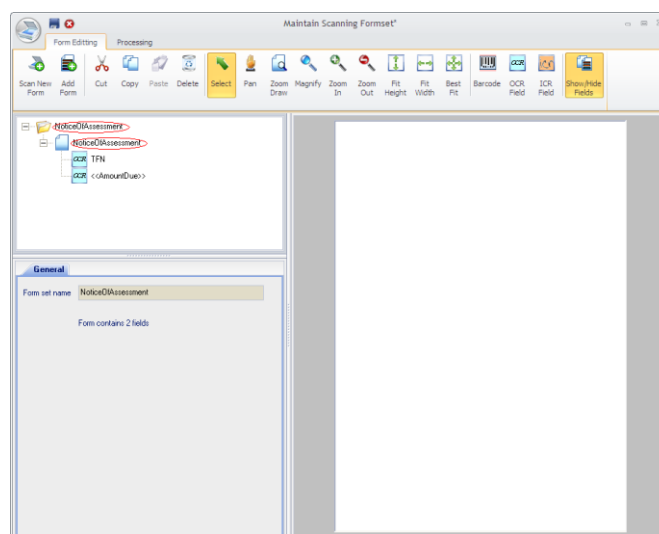


The 'Edit Matter:' dialog box is used to edit matter details. It has tabs for 'Summary', 'Production', 'Constraints', 'Security', 'Approvers', 'Disb. Budget', and 'Time Budget'. The 'Summary' tab is active, showing fields for 'Client ID', 'Client name', 'Year', 'Matter type', 'Description', 'Date received', 'Target date', 'Importance', 'Responsibility', 'Secondary Resp', 'Approval by', 'Assigned by', 'Estimated fee', 'Dept/Partner', and 'Notes...'. There is a checkbox for 'Is this a master?'. At the bottom, there is a checkbox for 'Do not contact client directly' and a checkbox for 'In accounting' (which is checked and circled in red). The 'Approve', 'Save', and 'Exit' buttons are at the bottom right.

- Added ability to have multiple form definitions per form set to this version. With this change, the users can store many form definitions into a single form set and link templates to a specific form definition as the default. In cases where a form set has multiple form definition files, when the user is batch scanning, a drop down will list all of the form definitions and the user can select which form definition should be used for the scanning. In previous version, if one had two identical forms, one containing say a tax file number and one containing say ABN, the users had to define two templates one for each. However, in this version, a single template can be used and linked to a form set that contains both form definitions. When editing form set files, you are preventing other users from scanning. You must quickly perform the required changes and finalise the form set file to allow other users to use them. Please note that the Batch scanning uses the same master matter number that was available in the previous versions. You will see two fields on the user interface for this but they are synchronised, that is changing one will change the other one as well.



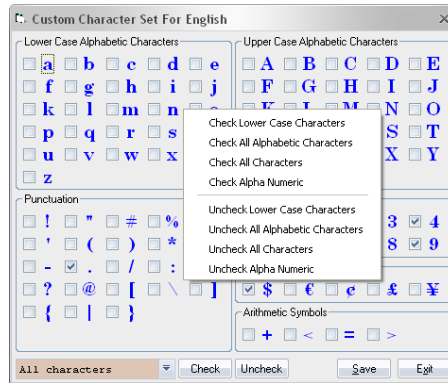
- The form set and form definition names are used to create physical files on the file system. In V09.00.00, the code was not removing the characters that are not allowed to be used in naming files. In this version, the invalid characters will be removed from the form set and form definition names. Fields names are not restricted as they are not used for file creation.



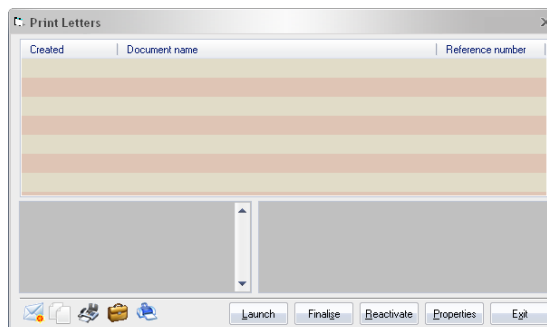
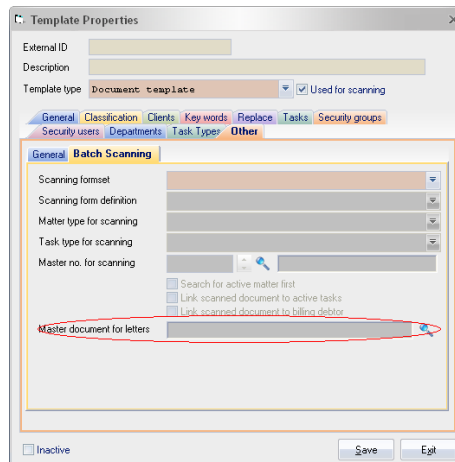




There was a bug in setting custom character set for OCR/ICR. This is fixed now. Also a popup menu has been added to the custom character set form. For each group, the relevant options will be displayed. You can either check or uncheck the characters using the popup menu or through the dropdown and the “**Check**” and “**Uncheck**” buttons.



When batch scanning, you may want to create a letter and send it to all of the clients that the scanned documents belong to. To do this, we have allowed a master document to be specified at the template in the batch scanning section. When this document is set, the batch scanning process will create the letter and attach it to all of the relevant clients. Once the scanning is complete and the letters are generated, a form will allow the user inspect the letters and print them if required.



- Added ability to define an OCR/ICR/Barcode field as a document replacement field in a form definition. Document replacement symbols are never used for entity matching. They are merely there to allow users to cut some bit of the scanned document and use that as a replacement symbol for creation of letters as explained above. Please note that when you define a document replacement symbol, a separate letter will be create for each client since the Replacement symbol may have different value on different document.

- Synergy will now enlarge the image before applying the image clean up and field recognition for the batch scanning process. This seems to have improved the accuracy of the recognition process considerably.
- We have added a new favourite type called “Reports”. Users can now add the most accessed reports to their favourites and run it from their Workcentre.

- When creating new matters from masters, some sites may have profiled their master matters and may want to use profile filtering for the master matter selection. We have added profile filtering to the master matter selection form. Please note that the profile filters will only be available when “Finalised master matter” radio button is selected.



In this version, we have provided a report that allows users to print the details of a dispatched document once it is dispatched. This report is accessible from the document dispatch form in edit mode.



In previous versions of Synergy, users had to delete all of the tasks before they can delete the matter. In this version we have allowed users to delete the matters without having to delete all the tasks first. This will work under the following conditions:

- \* The “Allow bulk task deletion” setting must be turned on.
- \* There should be no security group set for task deletion.
- \* In cases where task deletion is restricted by security group, the user must be in the security group.

The deletion is only allowed from the delete button on the “General” tab and the “Tasks” tabs of the Matter Control Centre. Please note that all validation will be performed on all tasks and the matter will only be deleted if the validation is successful.



As you know, the messages sent internally, will stay inside the database. However, in some cases, staff may require these internal messages to be sent to them via their external email address. This is generally the case for the staff that are often on the road and use blackberry phones to receive such emails. We have introduced a switch for users (only staff not teams) to allow all

internally sent messages to be sent to the user's email address. When this switch is set, the message sending process will add the email address of the user to the out going message automatically. Please note that the email address will not be attached to the message in Synergy. However, the stored message file will have a complete detail of the sent message.

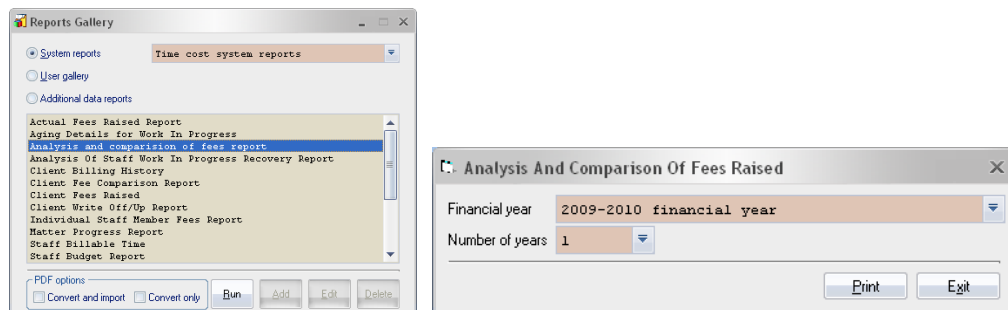
The 'Edit User' dialog box shows various user configuration options. The 'Forward Emails' checkbox is located at the bottom of the dialog, below the 'Link to Records Management location' and 'Fill gaps in diary' options. It is currently unchecked.

Module descriptions can now be customised for different client category and matter types. You can also customise these descriptions for client base types within a client category as well as task types within a matter type.

The following are screenshots of four configuration dialog boxes:

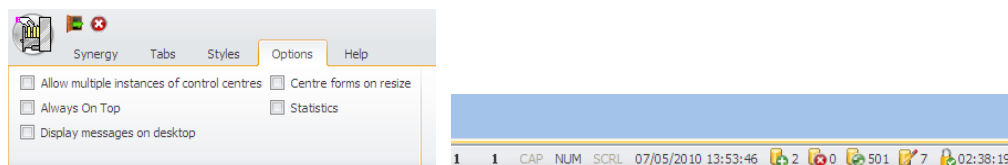
- Add Client Definition:** Shows fields for Description, Default client status (New), Default follow-up, and Default prefix. It also includes checkboxes for 'Enforce entry of the business name', 'Include in telephone register', and 'Inactive'.
- Edit Client Type Category:** Shows 'General details' and 'BPay details'. The 'Client type categories status' is set to 'Company'. The 'Use following for CRN generation' is set to 'Not used'.
- Edit Matter Category:** Shows fields for External identifier, Description, Budgeted time, and Client association category to copy. It also includes checkboxes for 'Warn users if there is no budget set', 'Target date is not mandatory', and 'Add sequence number to description'.
- Edit Accounting Detail Category:** Shows fields for Category (Accounting), ID, Target date days hence (0), and Description. It also includes a checkbox for 'Warn users if there is no budget set'.

- When linking the trust and other accounting systems in Synergy, the debtors and creditors were not being exported to these systems. In this version, Synergy will ask the user if this should be done. If so, the debtors and creditors will be synchronised to the selected QuickBooks accounting system.
- When creating documents from other documents, the importance of the document was being reset to default value. In this version, we have allowed the document creation to retain the importance of the original document.
- We have added a new report that allows users to analyse and compare the actual fees raised in various fee ranges for clients as well as total fees raised by matter types. This will help users in fee review process for clients as well as matter types in the system. You can specify the last financial year and optionally select up-to 4 years prior to the selected financial year to be considered. For clients, the description column will include the fee range and for matter types, the description column will included the matter type description.



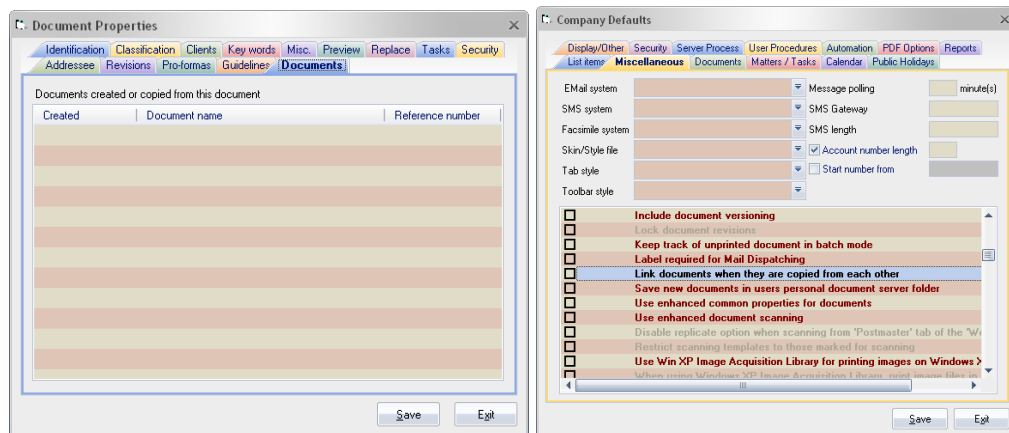
The screenshot shows the output of the 'Analysis and comparison of fees raised' report. It features the ST Synergy logo and the report title. Below is a table with columns for 'Description', '2007', '2008', '2009', and '2010'. Each year column is further divided into 'Fees(1)', 'Fees(2)', and 'Fees(3)'. The table is currently empty, showing only the header structure. At the bottom, there is a small footer indicating the report was printed on 06/05/2010, Page 1 of 1.

- Synergy will now display some statistics on the database activity of the user on the status bar such as number of records added, deleted, read and updated. These statistics are invisible by default and can be displayed using the “Statistics” check box in the “Options” tab of the ribbon bar. Please note that this setting is not stored anywhere.

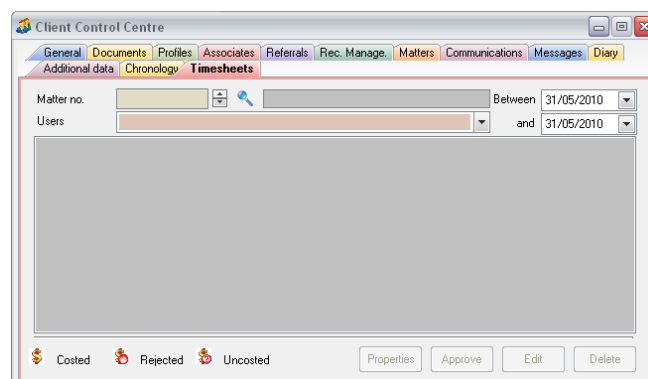


- In this version of the application, as documents are created or copied from other documents, Synergy will keep track of these. A new tab in the document properties will display the copied documents. Please note that the master documents are excluded from this; that is any document copied or created

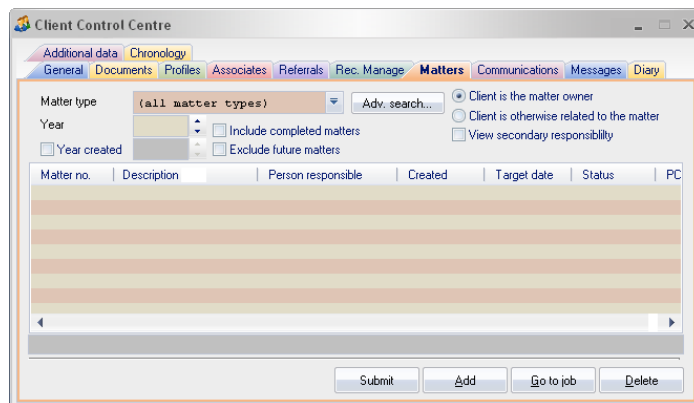
from master documents will not be linked to the master document. This option can be turned on from the housekeeping, company defaults under the documents section.



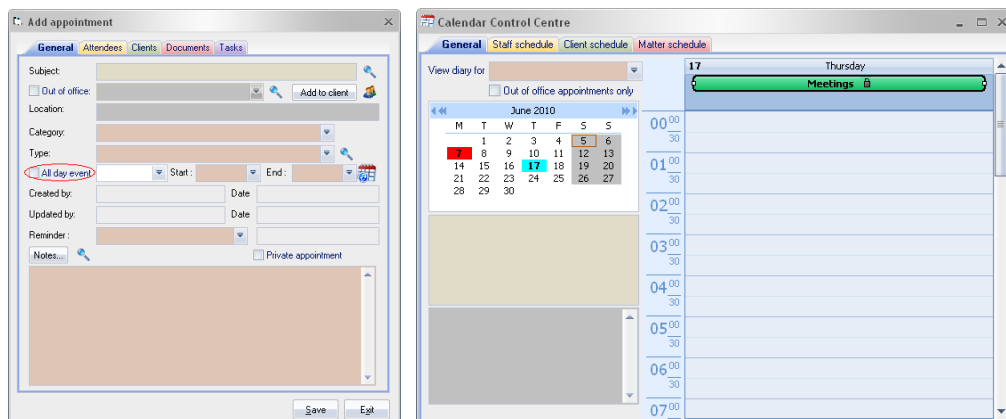
- ✚ In previous versions, when Synergy's version control was turned on, the PDF conversion of a document was assigning a new version number to the document. In this version we have rectified this since the PDF version of a document is pretty much the same as the original document.
- ✚ For those sites that are using office and time costing system, we have added a new tab called "Timesheets" in the Client Control Centre that displays the unapproved time entries for that client. The tab will display the time entries for the logged user and the current date by default. However, the users can select a date range, a matter number and a user to further filter the displayed records. There is no provision for adding or copying time entries. This tab is only added to enable easy access for time entries for a given client and/or matter. This tab will assist in approving all the time entries for a given client and/or before you send them an invoice. The user dropdown will display all of the users if the logged user is in the timesheet reviewer security group. If the logged user is not a timesheet reviewer, but is allowed to approve timesheet entries of other users, then the dropdown will contain the names of those users and approval and rejection of timesheet entries are the only function available. Please note that changing the user on this tab will not alter the timesheet on the Synergy side bar. We will consider adding a similar facility at the Matter Control Centre.



- Clicking the advanced search button from the Matters tab of the Client Control Centre does not pass the selected client to the matter search form. We have amended Synergy to pass the selected client to the search form.



- This version of Synergy will treat the appointments with start time of “00:00” and end time of “23:59” as all day events and display them at the top of the diary. We have also added a checkbox to the appointment creation form to make it easy for the user to set an all day event.

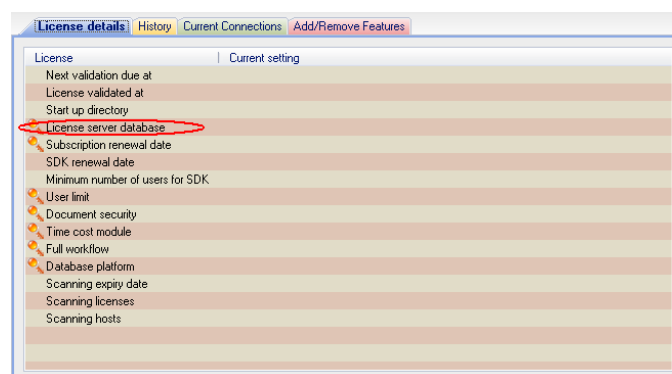
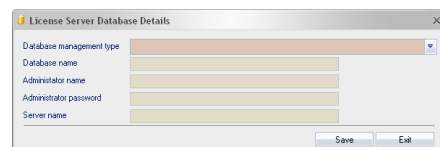
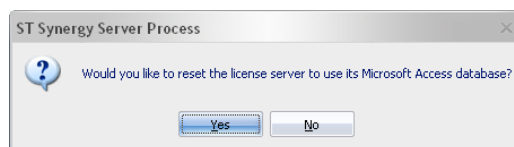
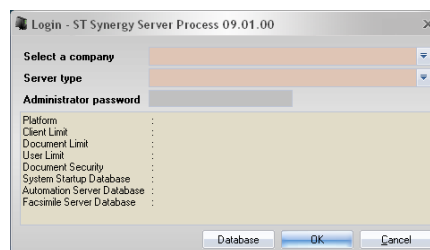


- In previous versions, when a user was logging off, some non-modal forms like the communication from were not closing properly. In this version, we have ensured that the user is warned if any of these non-modal forms were open before logging off. There was also a problem in logging off when Crystal Reports were dynamically loaded as an in-process control as opposed to a stand-alone application. On this version, we have also ensured that the dynamically loaded in-process crystal reports windows are closed before logging off.
- During the cut and paste operation on tasks of a master matter, in some cases, the tasks has to be recreated with new primary keys due to the hierarchical nature of the tasks. In cases where decision nodes are being recreated because of this process, the links between the live matters and such decisions had to be removed since the old tasks were being deleted afterwards. We have amended the code to preserve these links, that is, the live matters that were pointing to an old decision under the old task will now be pointing to the corresponding decision under the task in its new location. We strongly recommend the workflow amendments to be done by copying the master matter and working

on the new copy of the master matter. However, if you would have to amend an existing workflow, you must consider doing this at a time where there is no activity related to the master matter being changed.



We have allowed the license server to use a SQL Server database for its operation. When you receive a new installation package, in the system directory of the installation package, you will find 3 SQL Server database backups for SQL Server 2000, 2005 and 2008. For license server to use the SQL Server database, you need to restore the backup corresponding to the version of SQL Server that you are using on your database server. Once this is done, you can start the license server and a new database button will be displayed when license server is selected from the server drop down. Clicking the **“Database”** button will allow you to enter the details of the license server database on your SQL Server. If the database details are set to SQL Server, when **“Database”** button is clicked, you will be asked whether you want to revert back to using the default MS Access database. If you say yes, the license server database details will be deleted and the license server will restart itself and use the MS Access database. You can change the details either from the login form or from the license server interface as indicated in the below images.

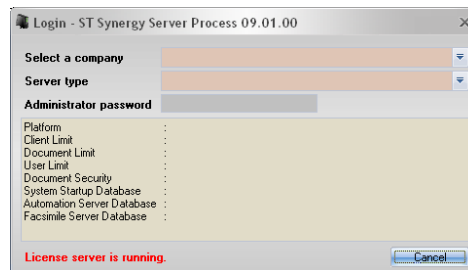


Please note that the license server database details are checked on regular basis from the Synergy application. When you change the database details, the clients that have leased license using the old database setting will lease a new license from the server using the new license server database setting.

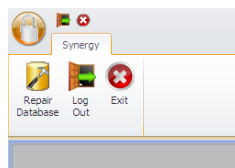


- Added an extra check to the Synergy Software Development Kit to ensure that the number of active users in the company that Software Development Kit is connecting does not exceed the user limit from the license file.
- We have added an extra checking to the server logon form. When users select the license server from the server drop down, the application will check to ensure that a license server is not running. If a server is already running, the “Database” and “OK” button will be made invisible and a label will be displayed informing the user that a server is already running. Please note that this is only done for the license server.

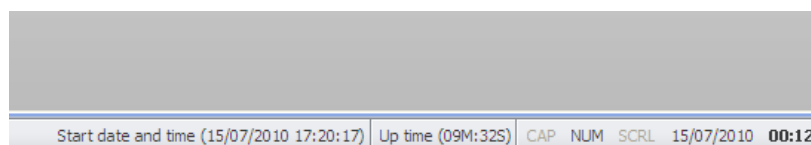
Synergy server process was not allowing the license server to start unless the Startup.mdb had at least one company that you could connect to. This was causing difficulties when servers being moved or renamed and the companies in the Startup database had all invalid connection. This has been rectified in this version. The ST Synergy License Server entry will always be displayed in the server type dropdown regardless of company database availability.



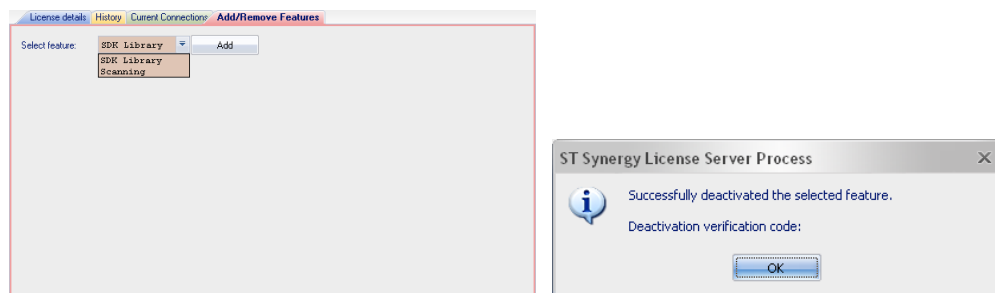
- We have added a “Repair Database” button to the license server application. This button will only be available when the license server uses the default MS Access database for its operation. This option will not be available for sites using SQL Server version of the license server database. This will allow users to attempt to repair and compact the sever database when and if it is corrupted. Also we have changed the code so that at the start up, the license server will automatically attempt in repair and compact the database should it be corrupted. Please note that the users must not have any connection to the server database for this to work interactively from the server application.



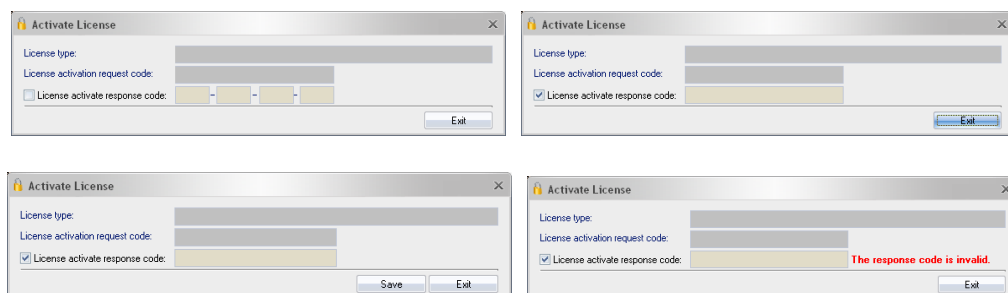
- We have also added the start time of the licenses server and the amount of time the server has been up and running in the status bar of the license server. The up time will be displayed in Weeks:Days:Hours:Minutes:Seconds as appropriate.



- ✚ A new tab in the license server interface allows sites to add or remove optional features from Synergy. When adding a feature, all of the license components for that feature must be unlocked before the feature is released. For example, to add the optional SDK feature to Synergy, the user has to unlock the expiry date and user limit for the SDK and once these license components are unlocked successfully, the feature is unlocked automatically. Please note that removal of the feature is much simpler and requires the user to just provide a single request code to us. When a feature is removed or deactivated, a message will be displayed at the end of the process. The message contains a deactivation verification code that needs to be provided to Synergy support staff.



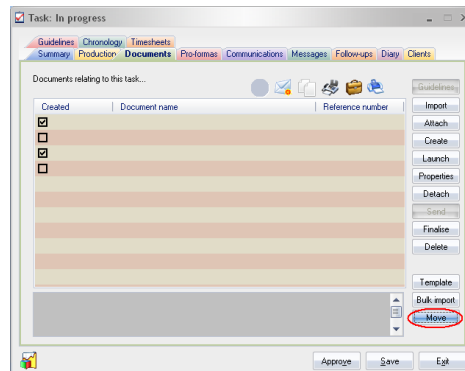
- ✚ We have changed the interface for unlocking license information. A new form will be displayed when users attempt to change the license information. In the past, the users had to type everything including the separating dashes. In this version we have provided a more user friendly interface for entering the response code. As user enters the code one character at a time, the cursor will move from one text box to the next as soon as the 4<sup>th</sup> character is entered in a box. When the last text box is filled, the entered code will be checked and if it is found to be valid, the “Save” button will be displayed. If the entered code is invalid, a label will be displayed and “Save” button will be made invisible. If the user likes to enter the entire code including the separating dashes (not sure why someone would want to do this), we have provided a checkbox for this purpose. When the checkbox is ticked the 4 text boxes will be replaced with one text box allowing the user to enter the entire code.



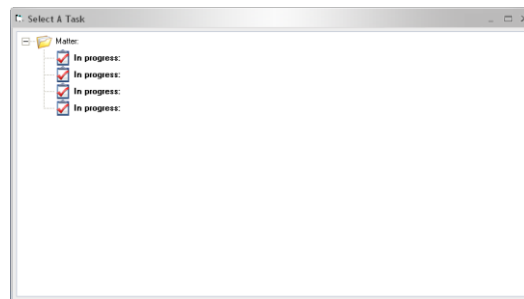
- ✚ The Software Development Kit was not closing the license server database in some instances. We have ensured that the license server database is closed when authentication is done.
- ✚ The license server has been restructured to close the Synergy.lis file during its normal operation. In this version, the license server only opens the Synergy.lis file when it needs to check and closes it immediately after its has

finished checking the file. This should minimise greatly any lock contention that may exists on the Synergy.lis file.

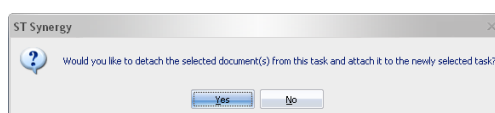
- In documents tab of the task edit form, there are two buttons called “Attach” and “Detach” that allows users to unlink a document from one task and link it to another task. These buttons allow the move to occur from any task to any task in the system. However, in most cases, users would want to move a document from one task to another task within the same matter just because someone has linked the document to the wrong task. To make this process easier, we have added a “Move” button to the document.



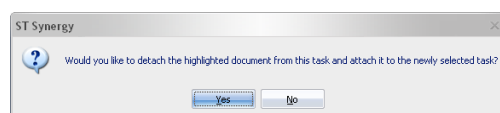
When the user clicks this button, the task selection form will be displayed with the currently selected task highlighted. The user the needs to select the task that s/he wants to link the documents to by double clicking on the task in the tree view.



The process will consider multiple selections from the document list. However, if the user has not selected multiple documents, that is, there is no check mark in the document list; it will process the highlighted entry. A confirmation message will be displayed before the process continues. Please note that the confirmation message is slightly different depending on the above tow cases.



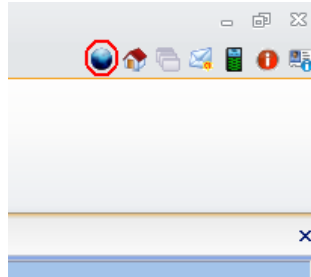
Message with check marked entries



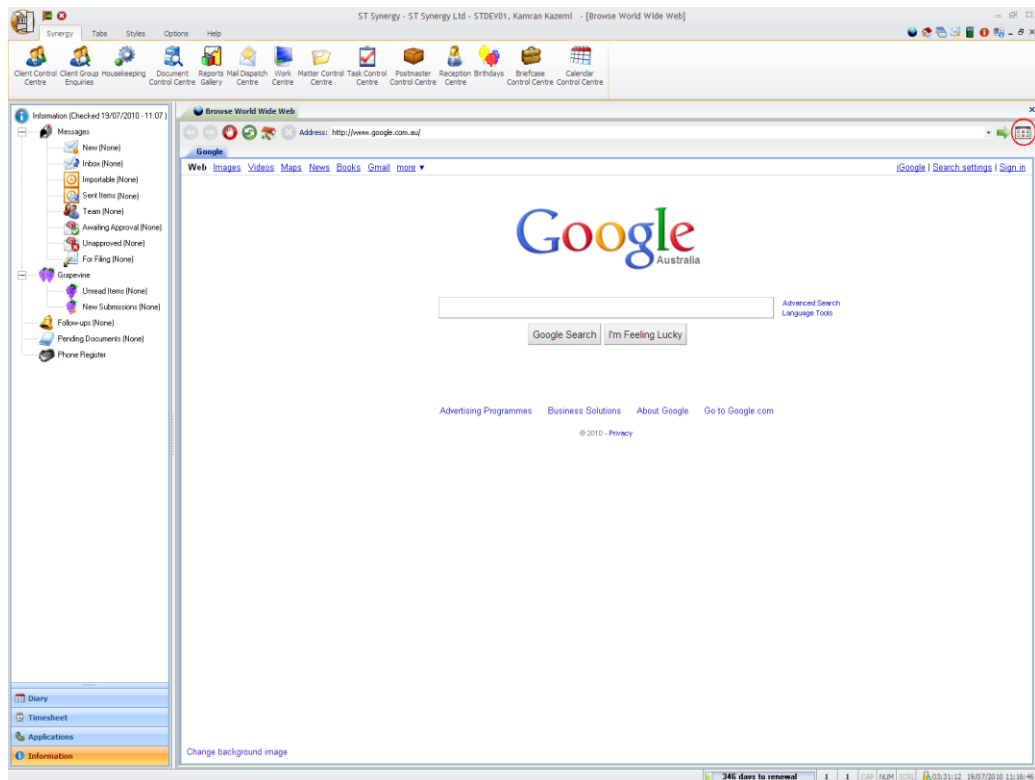
Message with no check marked entries

- In Synergy, users will find a browser button on the top right hand side of the toolbar. This button allows users to open a browser form inside Synergy. In previous versions, this button was tied to “**Allow multiple instances of**

**control centre”** option. Given that in the browser form, users have the ability to open multiple browser tabs (see circled icon in the image below), from this version onwards, we have de-coupled the browser button from the “**Allow multiple instances of control centre**”. This means that Synergy will only launch one browser form.



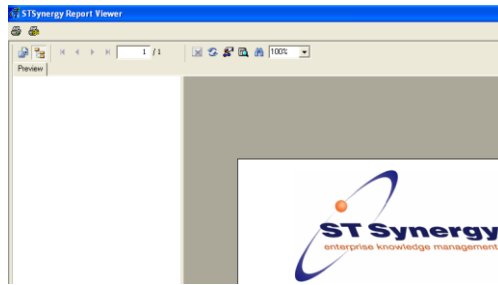
Browser toolbar icon



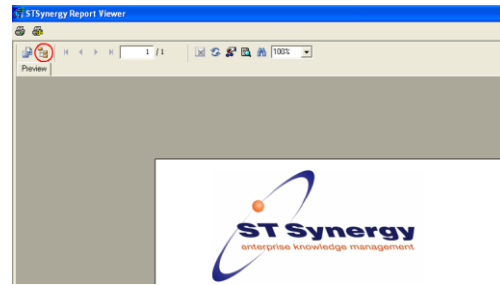
Synergy browser form and the new tab icon

- ✚ In previous versions, the postman object was being created as part of login process. Given the time consuming aspect of initialising the postman object in environments that are using Postman, we have postponed this initialisation to the instance when the object is accessed for the first time. This will speed up the login process. However, it may cause slight delay when postman is accessed for the first time when resolving client addresses from client edit forms. Please note that once the object is created and initialised, there should be no performance difference thereafter.
- ✚ In the previous versions, the Synergy report viewer was showing group tree preview pane by default on the left hand side. As this may clutter the report

viewing, we have made it invisible. To display the preview pane, please toggle the group tree using the icon from the toolbar.



Report viewer showing the tree



Report viewer with tree hidden

**Modification as at release 09.00.00**

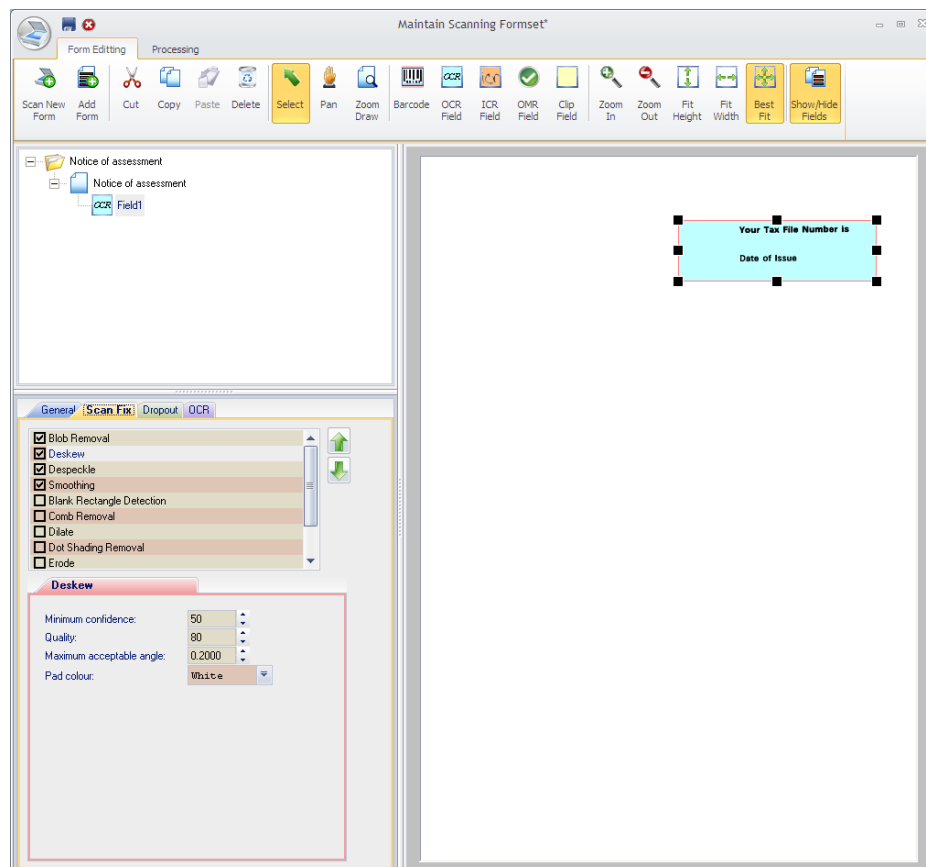
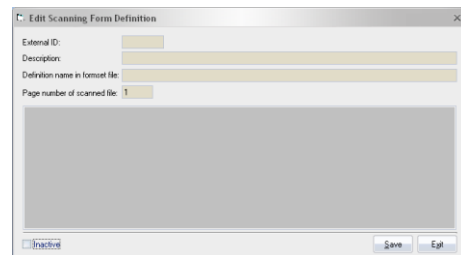
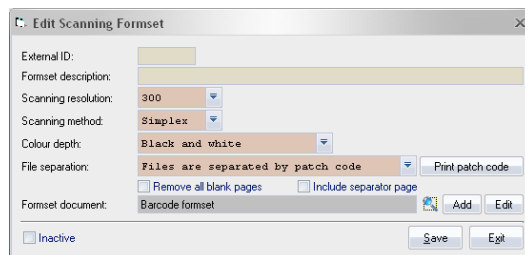
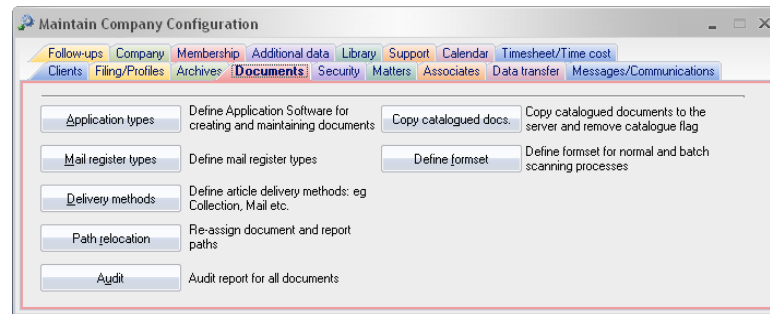
- ✦ Synergy is now Windows 7 (32-bit Editions) compatible.



- ✦ We have added ability to search clients by their birth date in the client search form.

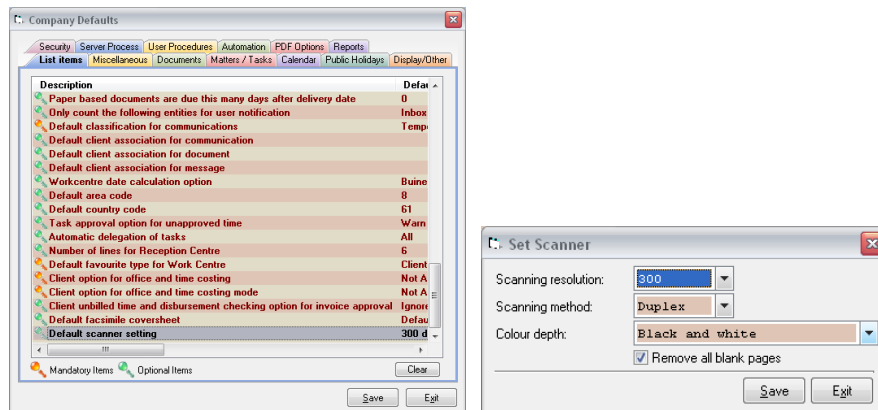
- ✦ We have provided scanning and OCR/ICR/Barcode recognition in this version of Synergy. Most popular 1D barcodes and some 2D barcodes can be recognised. We allow certain client and matter related fields to be recognised and used for importation of the scanned document. Our clients can define their own forms and fields using the facilities provided and link them to the templates for scanning. If you need a demonstration of the OCR/ICR capability of Synergy, please contact us and we will be more than happy to demonstrate this. There are facilities to create matters as documents are scanned. If there are matters already in the system, you can link the scanned

documents to these matters based on the matter and task types and the status of the task. The scanning controls provide many image cleaning operations that could enhance the recognition accuracy.

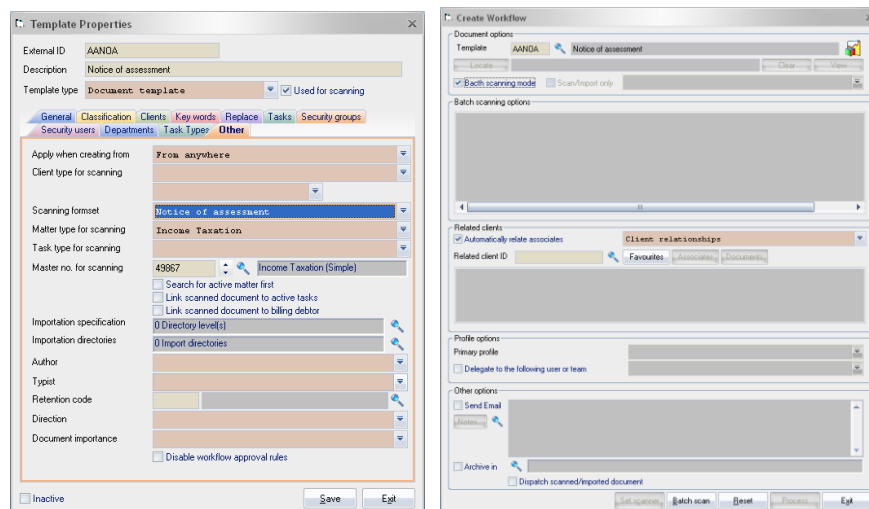


Our new scanning controls do not have royalty free runtime distribution rights. Consequently, unlike other features in Synergy, this feature can only be used by way of acquiring proper licenses. Please contact us should you wish to discuss your scanning requirement.

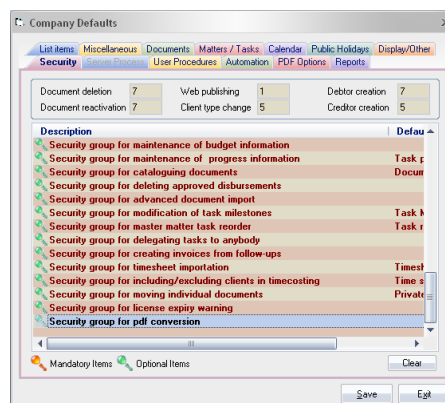
- Added a new entry to the list items tab of the company defaults allowing the default scanning resolution, colour and duplex to be set.



- The templates have been extended to include the formset information for batch scanning. This information will then be used in the scanning form to allow scanning and OCR in batch mode.



- We have added a security group to control who can convert documents to PDF. To preserve the existing behaviour of Synergy, absence of this security group will allow everyone to perform PDF conversion.







#### Changes to the diary system:

- When creating appointments in Synergy, the client for the appointment may not be in the system. In previous versions, the user had to create the client first before creating the appointment. However, from this version, users can create clients while creating the appointment. This can be achieved by clicking the client button from the general tab of the appointment form or using the popup menu from the clients tab. Creation of client can be achieved using the button next to the “Add to client” button.
- The subject of a diary appointment is defaulted to the description of the appointment category in the diary form in this version. As you select different appointment categories the subject line will be modified in the following cases:
  - 1) When the subject line is blank.
  - 2) When the subject matches the previously selected category.
- We have also added the ability to search and use library text for subject line of a diary appointment. This can be achieved using the button next to the subject line.
- In diary tabs with a list box, when editing appointments and saving them, the date on the day view was changing in some cases. This is fixed on this version.
- Users can now create recurring appointments. Due to reporting and time cost requirements, the database records for all recurring appointments must be created at the time of creation. To avoid long transactions, we have limited this facility to one year, that is, the recurring appointments will only be created for one year. Please also note that when, the recurrence pattern changes, all the past appointment will be left unchanged. Only future appointments will be modified if needed. The recurrence pattern can be set using the button next to the end time of the appointment.

**Add appointment**

General Attendees Clients Documents Tasks Security

Subject: [Empty]

☐ Out of office: [Empty] [Add to client]

Location: [Empty]

Category: Consultation

Type: Taxation

Date: 12/02/2010 Start: 08:00 End: 08:15

Created by: System Administrator Date: 12/02/2010 (12:50:17)

Updated by: System Administrator Date: 12/02/2010 (12:50:17)

Reminder: No Available 12/02/2010 08:00

Notes: [Empty text area]

☐ Private appointment

[Save] [Exit]

**Appointment Recurrence**

Recurrence pattern

☒ Daily ☐ Every 01 day(s)

☐ Weekly ☐ Every work day

☐ Monthly ☐ Yearly

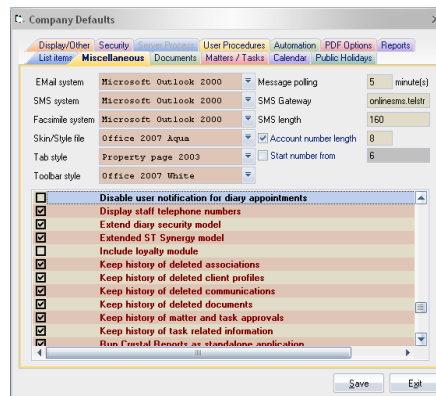
Range of recurrence

Start date: 12/02/2010 End date: 11/02/2011

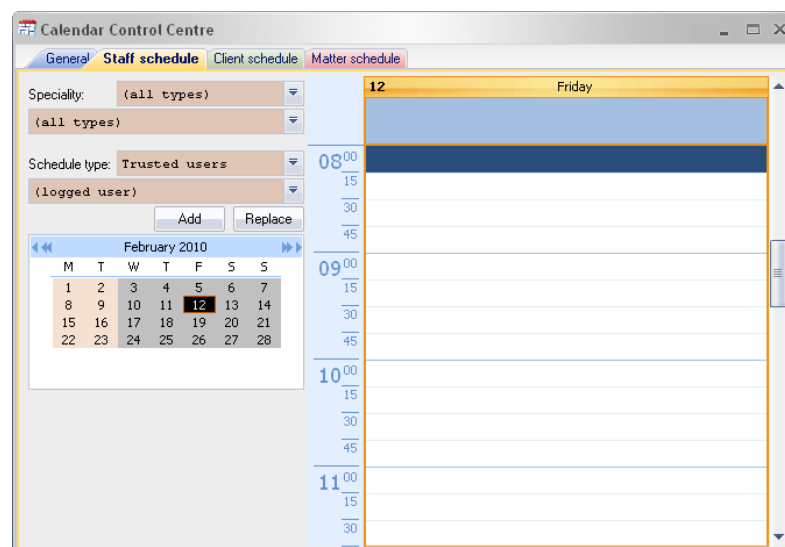
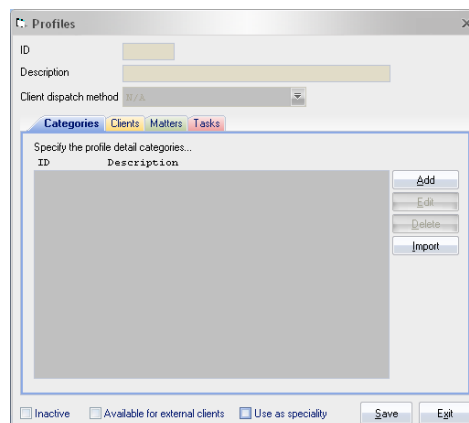
[Ok] [Exit]



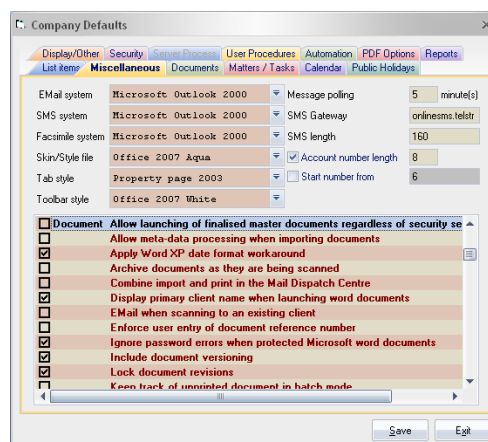
Added a setting in the housekeeping to disable the notification message that gets sent when diary appointments are updated.



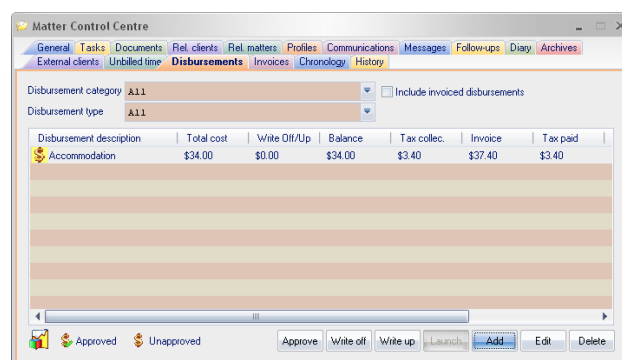
We have allowed profiles to be marked as speciality. In this version, these specialities are used in Calendar Control Centre to narrow down users by their speciality. We have also added a speciality drop down in the staff schedule of the Calendar Control Centre to make it easy to find staff with a specific speciality.



- Synergy provides many methods to secure a document. These security measures will be OK for normal production documents. In general master documents will be unsecured so that employees could use them for creation of documents. However, in some cases, an organisation may want to secure their modification to a group of employees. However, a by product of using security setting is that the security setting treats read and write access identically. This may create some issues when the employees need to look at the document to ensure that they are using the correct document for what they are doing and if the master document is secured, they may not be able to do this. We have added a setting in the company default form that allows the finalised master documents to be launched by everyone even when they are secured through various security setting (groups, users and priority level). This setting is turned off by default to preserve the current behaviour of the system.



- The legend in the disbursement tab of the Matter Control Centre is corrected now. The disbursement entries with the thick are those that are approved and those without thick are the unapproved disbursements. The previous versions had the word “Invoiced” and “Not invoiced” which is incorrect.



- We have made provision to specify a default team for a user. For now, this default is only used in the Calendar Control Centre to set the team. However, this may be extended in the future to other areas of the system. We have also allowed users to have a minimum block for their appointments. When the minimum block is set, the system will check to see whether the appointment duration is consistent with this setting. If not, the user will be warned. The default value for this is set to 0 to preserve exiting behaviour. In some cases,

users may want a visual cue in the diary control for these appointment blocks. We have also added a setting to a user that allows sites to specify which users will want these visual cues. These colour and default text for these blocks can be set from the calendar tab of the company defaults form. Please note that these blocks can only be displayed when the diary control is a user based diary like Workcentre and Calendar Control Centre. In Client Control Centre and task form, the diary is for the client/task not for the logged users. Consequently, these blocks will not be present there.

The 'Add User' dialog box consists of two tabs: 'User details' and 'Teams/Clerks'. The 'User details' tab includes fields for User ID, Name, User type, Password, Confirm password, Check messages every, Start with, Access group, Title / position, Email address, Telephone, Accounting default, Scanning app, Scan directory, Document server, Briefcase, and Secure directory. The 'Teams/Clerks' tab includes fields for Default team and Filing clerks for this user.

The 'Company Defaults' dialog box has several tabs, including 'Calendar'. The 'Calendar' tab includes settings for Blank Appointment, Appointment interval, External day, Weekdays, Working hours, and Blank appointment description.

The 'Work Centre' dialog box has a 'Diary' tab. It shows a calendar view for February 2010 and a detailed view for Tuesday, 16th, showing available time slots from 08:00 to 11:00.

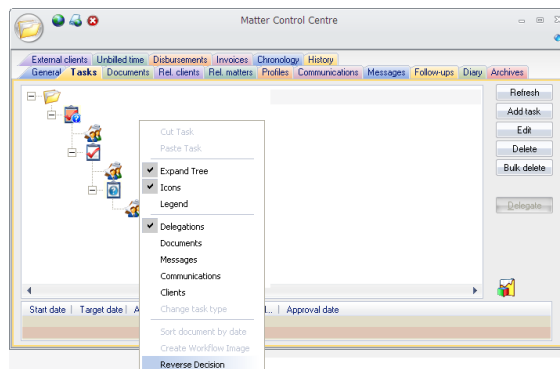
- When organisations are using Synergy's office and time costing system, Synergy was not copying the disbursements from the master matter to live production matters when they were being created. In many cases, a workflow item could have default fees and charges (photocopying, travelling allowance etc.). From this version onwards, these default items can now be set up in the master matter which is then copied to live matters. Please note that the Software Development Kit has also been amended to cater for this change.

Please note that the disbursements will only be copied if your organisation is using office and time costing system and the current billing period has not been rolled over. Please also remember that this feature will not work when creating matters from other live matters in the system.

✚ Some more information has been added to a couple of standard reports please copy those new reports to your SysDir.

✚ The Synergy license server used to open a connection to its Microsoft Access database and keep that connection as long as it was active. We have changed this so that the server disconnects from the database and reconnects to it.

✚ In cases where wrong decision was made on a workflow, there was no way to restore the workflow to the decision point again. We have added ability to restore a previously made decision back to its initial state from the task tab of the Matter Control Centre. The reversal of decisions can be performed by those that could approve the task. The decision reversal will clean all of the sub-tasks under the decision and then convert the task back to a decision node. Please note that reversing a decision will simply delete all sub-tasks under the node without processing any of the linked documents, communications, follow-ups, messages, etc. You may also need to note that you can only proceed with this option if you could successfully delete all of the sub-tasks. If there is anything that prevents deletion of sub-tasks, then the reversal process will stop. Please note the new icon for these nodes in the following image. The icon is a mix of task and decision icons.



To be able to reverse a decision, the following rules must be met:

- 1) You must be in the security group that allows task deletion if you have restricted this via security groups.
- 2) You must be able to approve the decision that you are trying to reverse. Otherwise you would not have been one of those that actually made the decision in the first place.
- 3) If there are tasks already under the decision that is being reversed, you must be able to approve all of them. Otherwise you will be undoing someone else's work.
- 4) There should be no costed entry against any of the tasks that are under the decision being reversed.

The reversal process will do the following:

- 1) All documents attached to the tasks under the decision are linked to the decision node.

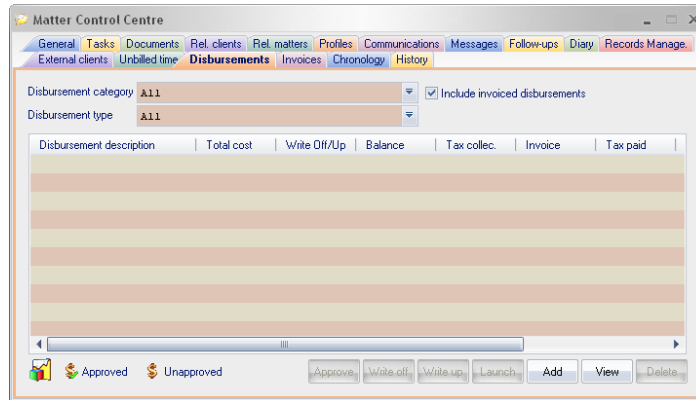
- 2) All communication attached to the tasks under the decision is linked to the decision node.
- 3) All messages attached to the tasks under the decision is linked to the decision node.
- 4) All diary entries attached to the tasks under the decision is linked to the decision node.
- 5) All follow-up attached to the tasks under the decision is linked to the decision node.
- 6) All un-costed time entries attached to the tasks under the decision is linked to the decision node.
- 7) And finally all of the tasks under the decision being reversed will be deleted.

- ✚ Some gray text boxes in report forms were not completely disabled. We have fixed these forms in this version.
- ✚ The client Synchronisation process was failing when it was checking the client exclusion list. This has been corrected in this version.
- ✚ The staff billable time report was incorrectly including the matters of the host client when the “**Exclude matters of host client**” was ticked and “**Exclude inactive client**” was unticked. This is corrected in this version.

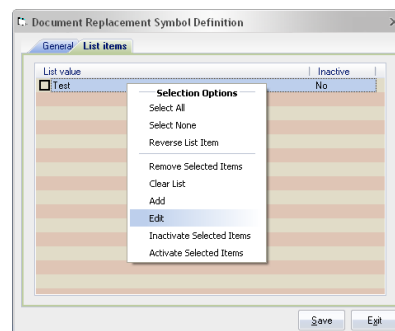
- ✚ There was an error in deleting public holidays in the public holiday form which is corrected in this version.

Date	Public holiday description
26/01/2010	New Year's Day
01/03/2010	Australia Day
02/04/2010	Labour Day
05/04/2010	Good Friday
26/04/2010	Easter Monday
07/06/2010	Anzac Day
27/09/2010	Foundation Day
27/12/2010	Queen's Birthday
28/12/2010	Christmas Day
	Boxing Day

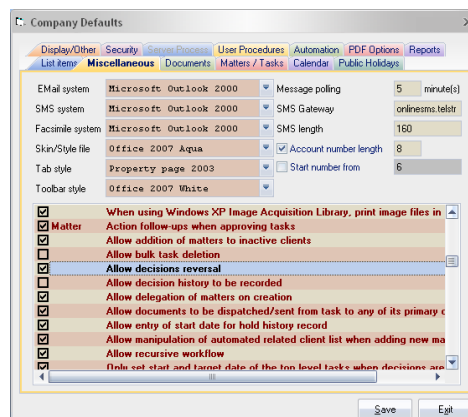
- ✚ The “View” button is added to the disbursement tab of the matter control centre which will allow users to view invoiced disbursement details. Please note that you will only be able to view the details. All controls will be locked for the invoiced disbursements.



- ✚ The loyalty form was not displaying the correct client name in edit mode. This has been corrected in this version.
- ✚ Allowed the list items of the replacement symbols to be edited. When items were added to the list the comparison with existing list items were cases insensitive. Consequently, the form was ignoring changes in the casing of the newly added/edited item. The form still performs case insensitive comparison but when it finds the item in the list, it updates the item with the newly added/edited item.



- ✚ Added two setting to the housekeeping to allow users to enable/disable the decision reversal feature. When this feature is enabled, users can decide whether they want the history of answers to be kept in the system or just the last answer is required to be recorded. This can be done from the "Miscellaneous" tab of the company defaults form under the workflow section. The default is set to false for both to preserve the existing behaviour of Synergy.



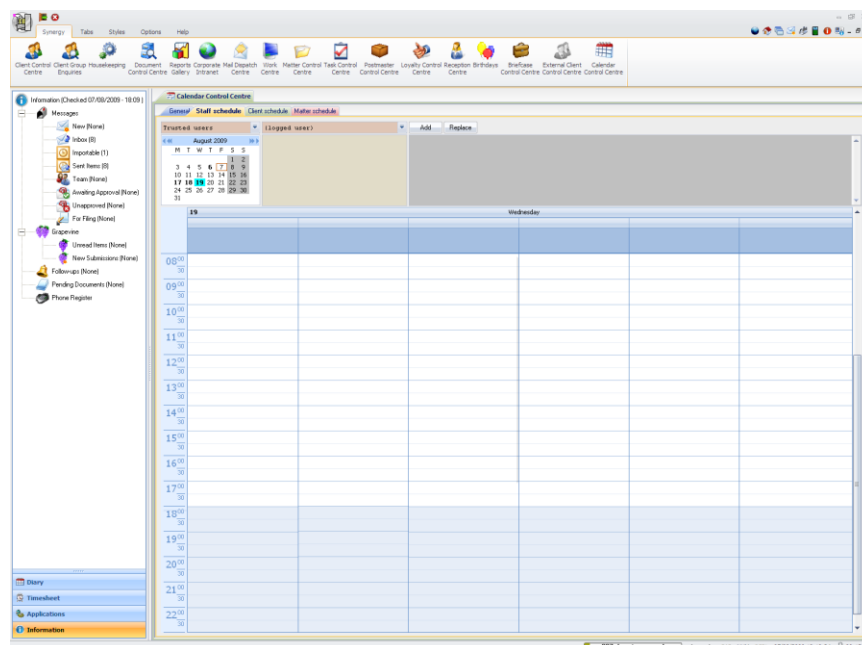
*Modification as at release 08.00.05c*

- ✚ In some cases, the diary appointments were not getting included in the chronology report. Fixed the SQL join error that was causing this.
- ✚ The controls in the Synergy server applications will, now, be centred when the application window is resized.
- ✚ Fixed the incorrect record count that was being displayed in QuickBooks server.
- ✚ The Client Synchronisation process will now add the window handle of its main window so that the pre-processors can communicate messages to the Client Synchronisation process. The message must be sent using the WM\_COPYDATA message and SendMessage Windows API. If you have configured Synergy to run a pre-processor, please contact us for detailed specification the inter-process communication requirement as well as the list of command line arguments that will be passed to the pre-processor.
- ✚ Synergy was not reading the “Restrict Task deletion to those on the Security Group” housekeeping option. This is fixed.
- ✚ When a decision task was approved for the first time, the given answer was recorded in the system and the decision task is approved. If users activate the task again, Synergy was treating this task as a normal task and was deleting the previously recorded answer. This is now fixed and the recorded answer will remain there as long as the task is not deleted.



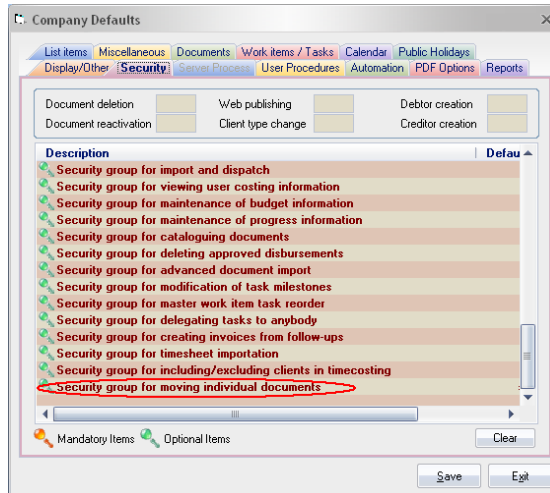
### *Modification as at release 08.00.05b*

- ✚ Sybiz Vision accounting users would have noticed by now that when a customer or supplier that is linked to Synergy is updated in Sybiz Vision, the primary contact details does not get updated any more from Synergy. This is caused because during the manual update of the records in Vision, a new contact record is created in contact table for the customer and supplier. This table did not exist in the earlier versions. Synergy has been amended to include the update of the primary contact for the customers and suppliers when they are updated from Synergy.
- ✚ We have changed the staff, client and matter schedule tab of the Calendar Control Centre. These tabs are now using a proper scheduling diary. Users can add, remove and replace other staff, client and matter to the diary and look at them all in one view. The form can now be maximised which allows the best use of the screen. This form now presents a much more user friendly interface for those customers that are diary centric.



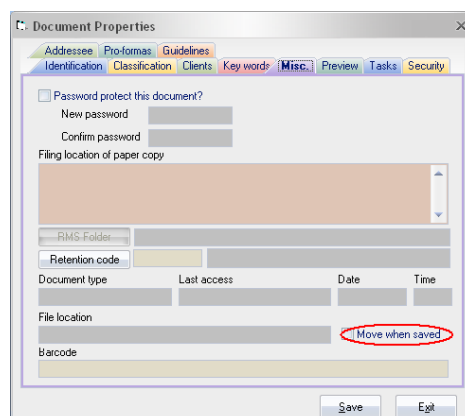
- User will have all of the options available from the diary popup menu that will be displayed from these tabs. A new menu option will be exposed for these multi-resource calendars called “Schedules”. One can delete or clear all schedule from the multi-resource diaries. Please note that by deleting or clearing these schedules from the multi-resource diaries, you are only clearing the user interface not the actual diary appointments.
- ✚ The shortcut bar icons were not considering the housekeeping setting. For example, Synergy was adding the pending documents icon regardless of whether the pending documents statistics were set to be displayed from housekeeping. The shortcut bar, now considers the housekeeping setting for displaying these icons.
  - ✚ In many cases, it would be useful to relocate an individual document from the document. As you know, this can be done from the housekeeping form but then one has to provide access to all those individuals that may require performing this operation which becomes unreasonable. We have provided a

security group that allows sites to define who can perform document relocation from the document properties form. If this security group is set, only people within this security group will have the ability to perform the document relocation from document properties form. Obviously, System Administrator will always have the ability to do this.



When the individual document move security group is set, the users within that security group (including the SA) will see a check box in the miscellaneous tab of the document properties form if the following conditions are met:

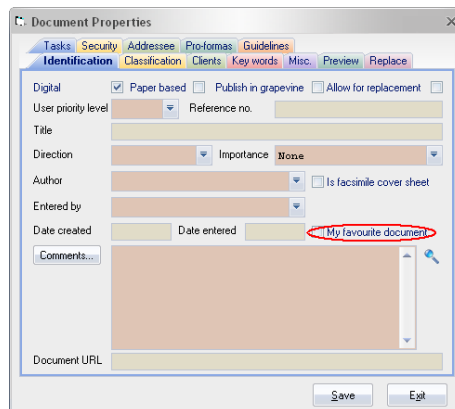
- 1) Document security server must be excluded from the license server.
- 2) The user must be in the security group.
- 3) The document must already be a digital document. When adding a digital version of a paper based document, this function will not be available.
- 4) The document must not be catalogued.
- 5) Document must not be finalised.
- 6) Document must not be checked out.
- 7) You must not be applying common properties of the viewed document.



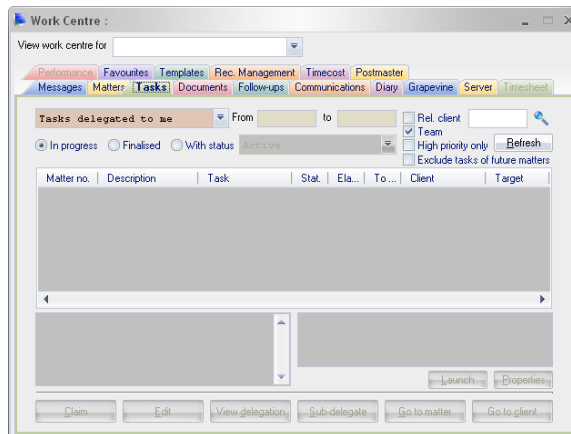
Importing emails from sent items in Outlook was not considering the housekeeping setting for imported messages. Synergy now considers the sent items folder identical to inbox folder in a sense that when emails are imported

from the sent items, the email in the sent items folder will be either moved to the imported messages folder (under the inbox) or deleted based on the housekeeping setting for imported emails.

- ✚ We have added a check box to the document properties form that allows users to add or remove the document from their favourite document list. When the form is loaded, the check box will indicate whether the document is in the list or not. You can add or remove the document from your favourite list by ticking or unticking this check box.

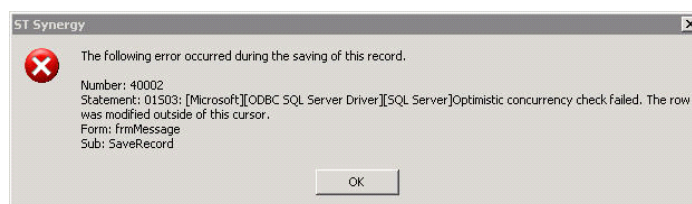


- ✚ When users were clicking on the finalised radio button on the task tab of the Workcentre (Tasks delegation options), the list was not showing the approved delegations. Instead, it was using the status from the status drop down to display the list. This is now corrected.

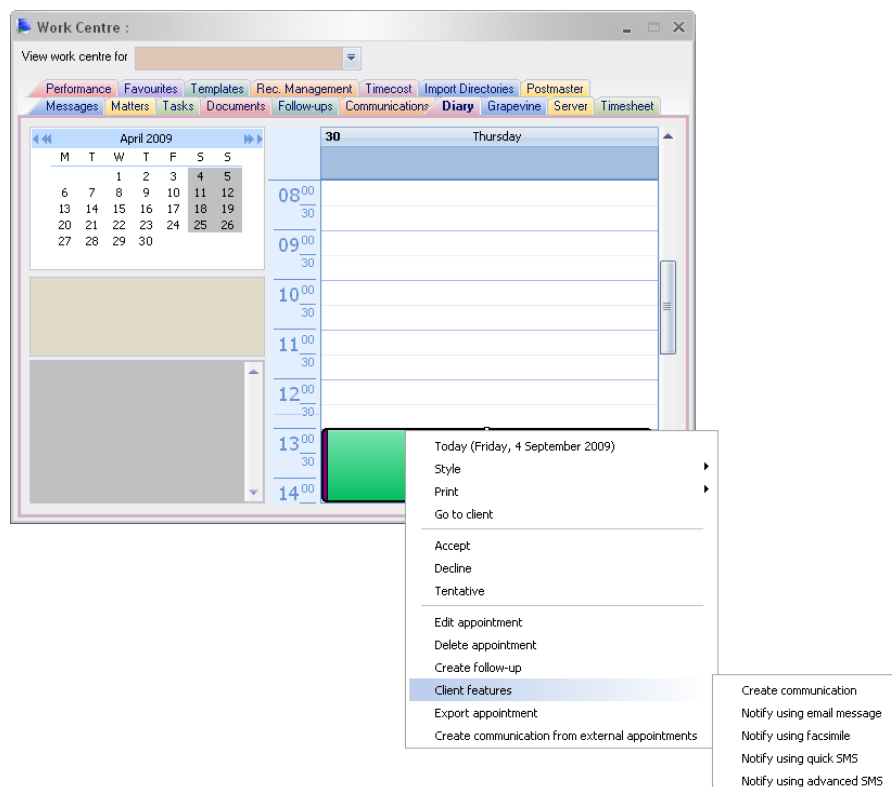


- ✚ Addition of multiple entities in the favourite tab was not working. This is now fixed.

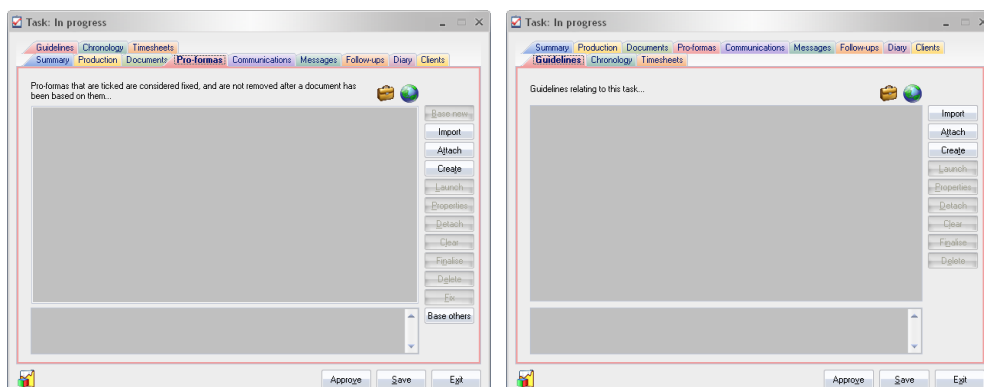
- ✚ When importing and editing messages, changing the message direction could in some cases cause the following error. This error is fixed now.



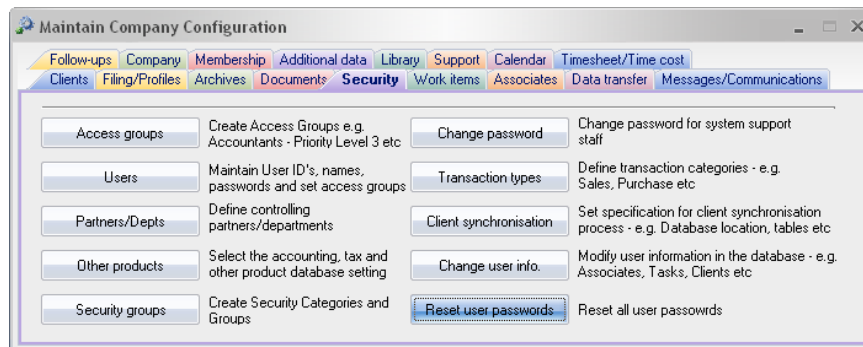
- We have added new menu items to the popup menu that gets displayed for a diary appointment. If the user selects a diary appointment and then clicks the right mouse button, the popup menu is extended to allow creation of communication, sending email reminders, fax reminders and SMS reminders to the clients. When any of these options are selected, then the user is prompted to select clients and then the proper form will be displayed with the selected clients attached to the relevant form. If there is a single client for the appointment, then the client selection is bypassed since there is a single client. Please note that this is only available for appointments that are linked to a client. The menu items will not be displayed for none-client related appointments.



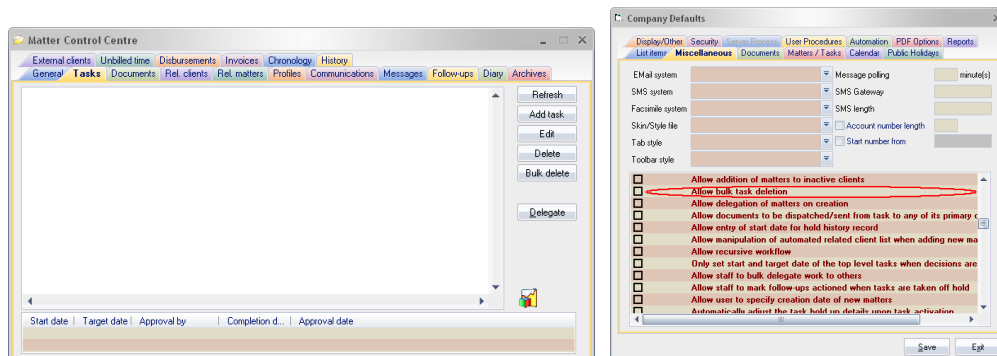
- We have added briefcase facility for the pro-forma and guideline lists in the task edit form.



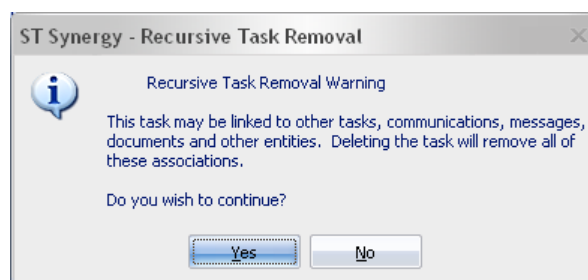
- Added a feature that allows all user passwords to be reset to the corresponding external identifiers. This feature will only be available to System Administrator in exclusive mode from the security tab of the housekeeping form.



- The tool tip on the recipient list was always displaying the entities (client and external clients) email address. The tool tip will now display fax number or mobile number when fax or SMS is being created. We have also changed the popup menu item to allow fax and mobile numbers to be updated similar to the updating of the Email addresses when faxes or SMS is being composed.
- Added a new button called “Bulk delete” to the task tab of the Matter Control Centre. This button allows users to delete a task and all its sub-tasks with one click. This will hopefully make the deletion of tasks easier when there are many sub-tasks under a task tree. Please note that the deletion of each task will follow the business rules and only be deleted if it passes all of the business rules. The button will only be visible if the “Allow bulk task deletion” option is turned on from the company defaults.



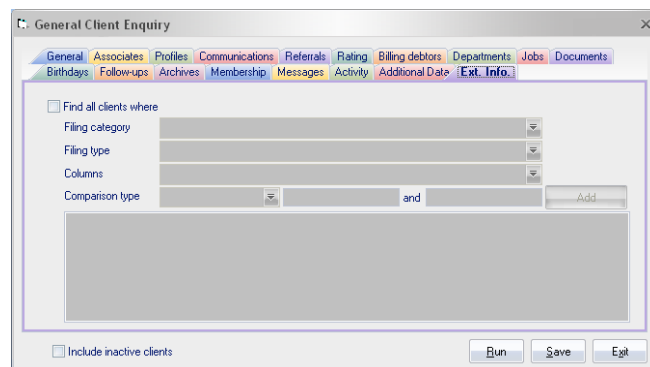
When the clear button is pressed, the following message box will be displayed and the user has to confirm the deletion before the task deletion can proceed.



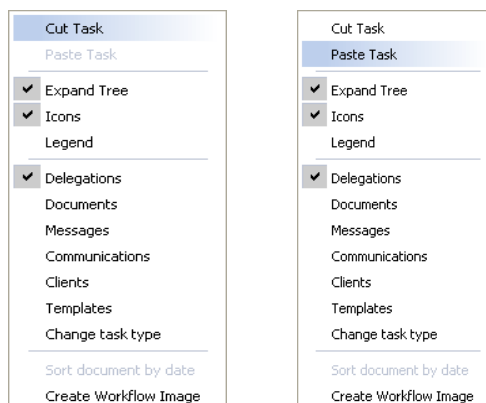
- ✚ The ad-hoc enquiries against the external information were not working properly. Given that these columns can be set to null, adding any conversion functions to these columns were causing run-time error 94.

Synergy executes all of the stored queries and ad-hoc queries against the attached Microsoft Access database. The reason for this choice is to allow cross database queries in cases where Synergy is linked to other accounting systems like Sybiz Vision. However, when external information table is linked to MS Access database, the Jet engine converts the decimal type columns to text fields. Consequently, any comparison against these fields was based on text comparison rather than a numeric comparison. We have amended Synergy to explicitly wrap these columns in a conversion function.

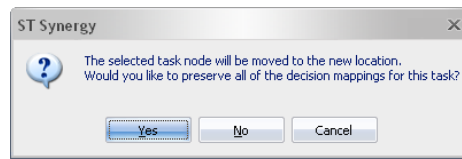
Also, the external information queries were not filtering the data by the filing classification either. This was producing the wrong result since information on the same column could be linked to different external information type.



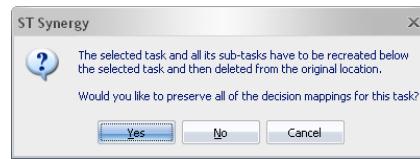
- ✚ On the task tab of the Matter Control Centre, a cut and paste option was available for master matters. However, this option was only operational in cases where the new parent for the cut node was created before that task that is being cut. For such a move to be possible; the selected task and its sub-tasks must have been copied to the new location. This restriction is removed now and users can move any node to any other location in the task tree. The only restriction is that you cannot move a parent task under one of its children since this will cause recursive copying of tasks.



We have also allowed the user to specify whether they need the decision mappings to be preserved. The following message boxes will be displayed in a cut and paste operation as appropriate:

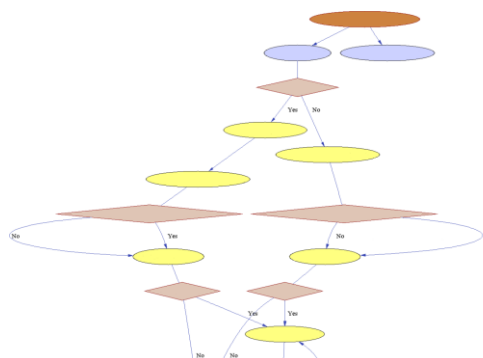


Tasks do not need to be copied

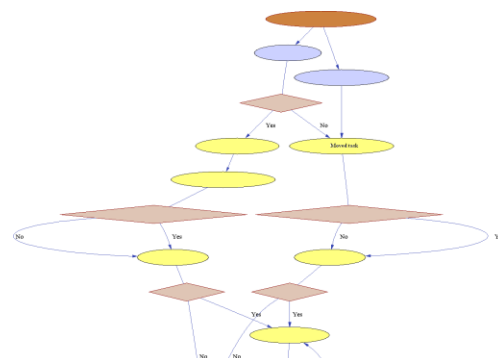


Tasks have to be copied

The following image displays a cut and past operation with the decision mappings preserved. As you can see from these images, the first “No” answer is still mapped to the task after the paste operation.

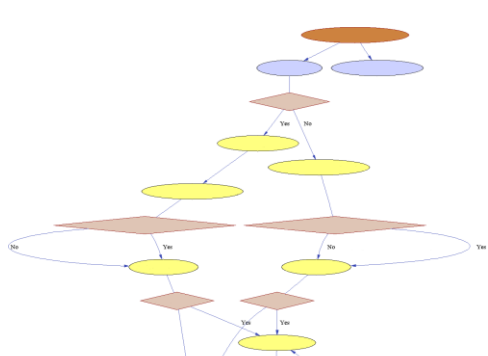


Original Master

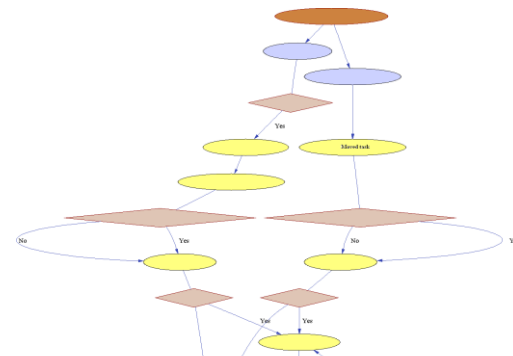


Master after task move -  
links preserved

The following two images display a cut and past operation with the decision mappings removed. As you can see from these images, the “No” answer is no-longer mapped to the moved task.



Original Master

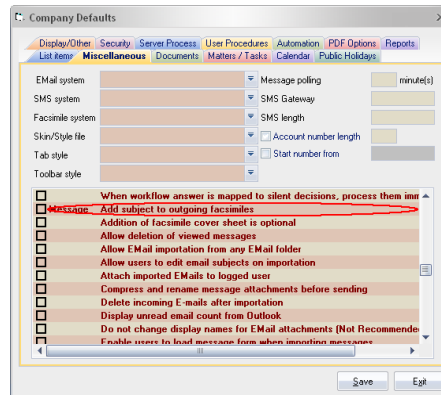


Master after task move -  
links removed

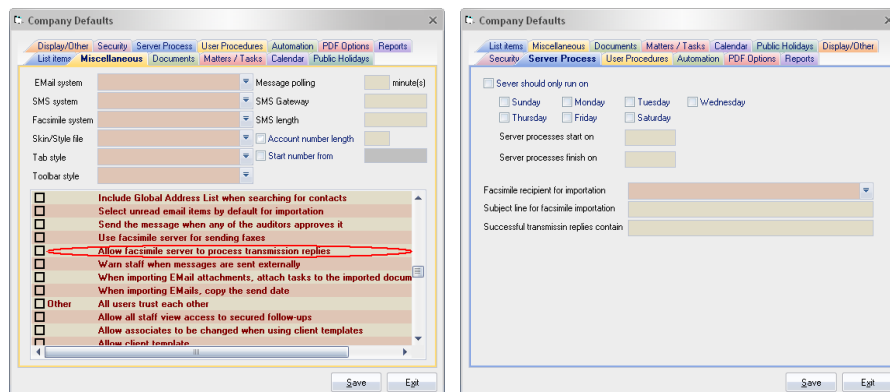


When the Synergy’s facsimile server sends facsimiles, outgoing faxes does not include a subject even if the subject line is set in the Synergy database. This makes it difficult to tie a response from the fax transport layer to the items in the fax server list. We have introduced a new setting in the company defaults of the housekeeping form that allows user to force the fax server to set the subject line for out going faxes. When this is set, the outgoing faxes will have

the subject line from the Synergy database. Given that most fax transport layers replies include the subject line, it should now be easier to tie a reply to a fax that was sent by the fax server. The default is set to false to preserve existing behaviour.

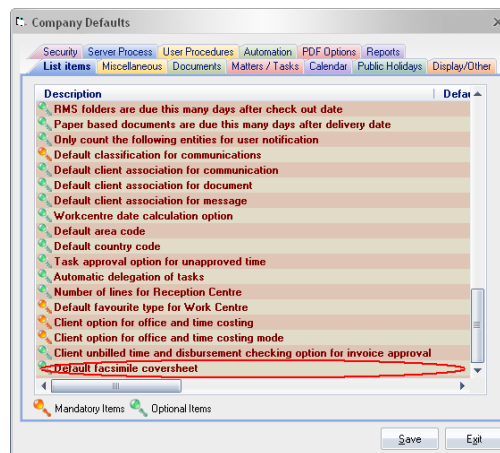


When Synergy's fax server is used for sending and receiving faxes, incoming faxes are routed to a single user responsible for distributing incoming faxes. However, when a user composes and sends a fax in Synergy, there was no reply from the fax server to the sender indicating whether the fax was sent or not. We have added a new setting to the company defaults of the housekeeping form allowing users to enable the fax server to process the replies from the fax transport layer. When this option is turned on, the fax server assigns a unique facsimile key to each fax and adds this key to the subject line of each outgoing fax. Given that the fax transport layer replies include the subject of the transmitted fax on subject line of its reply message, the fax server strips these unique fax identifiers and sends a quick email to the sender of the fax. When replies are processed, the fax server will look for a specified string (in the server tab of the form) before considering the transmission a successful transmission. Please note that for reply processing to work properly, you must remove any Microsoft Outlook rules that you might have defined to move/delete the fax transport replies. You must also ensure that all of the Synergy users have valid email addresses. Failing to do these, the fax server will be unable to process these replies properly. All processed replies will either be deleted or moved to "Processed Fax Replies" folder under Inbox depending on the housekeeping setting for imported emails. The default is set to false and blank to preserve existing behaviour.



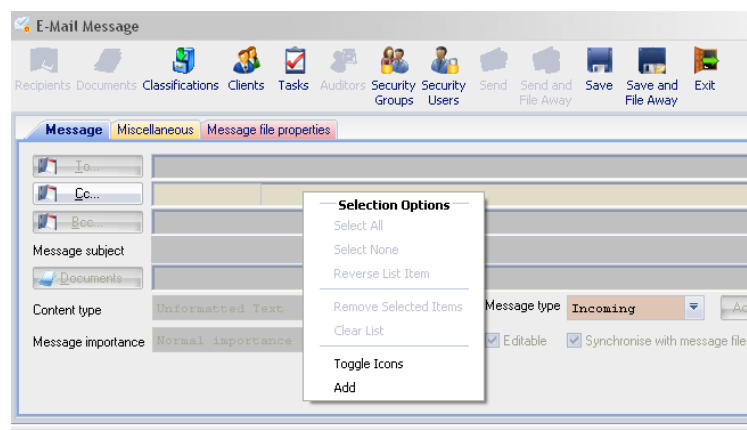


- Added a new setting to the list items tab of the company default form allowing those sites that are using ST Synergy faxing to default the content of a fax to a coversheet. This fax coversheet must be an rtf file and should not have any mail merge symbols. There are 3 default replacement symbols that can be placed in the default fax coversheet document. These symbols are “<Sender>”, <Company> and <Date>. When Synergy creates a fax, the default fax coversheet will be set as the content of the fax. It then does the symbol replacement, replacing the <Sender> with the full name of the person that is composing the fax, <Company> with the title of the host client and the <Date> with the current date (format is dddd, dd MMMM yyyy). The default is set to blank to preserve existing behaviour.

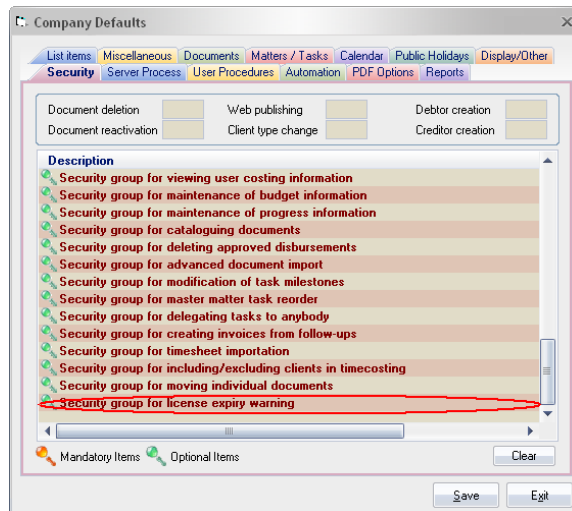


Currently, resending of the faxes must be done from the server. However, in the future releases, we will attempt to make it easier to resend faxes from the ST Synergy itself.

- This version of client synchronisation will synchronise the DateEntry field from ZZSYNCLI to ZZCLIENT if there is any dates entered in that field.
- In this version, we have allowed popup menus to be displayed for imported messages. In previous versions, users could add internal staff members to an imported message using the Cc button. However, when mistakes were made and wrong staff was placed in the list, there was no facility to remove them from the list. With this change, users can completely manipulate the list.

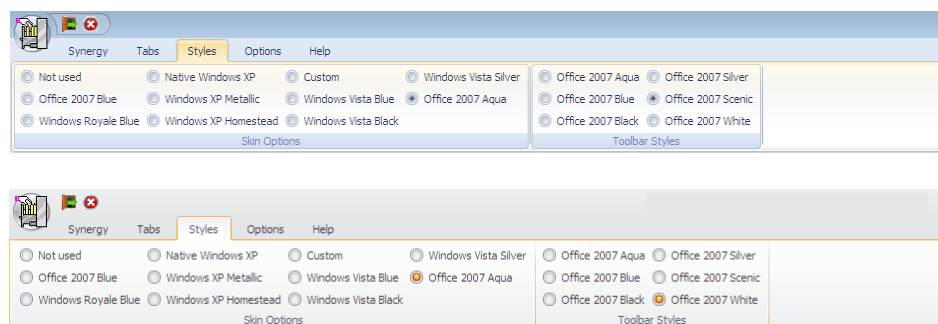


- ✚ We have extended the search from the entry field for the client list on the miscellaneous tab of the message form to include client title search. With this version, Synergy will first search the account number. If a match is found, then that client will be added to the list. Otherwise, it will try finding the client using the client title and if a match is found, then it will be added to the list.
- ✚ We have discovered a bug in automated finalisation of documents in the scanning form. In cases where the dispatch check box was not turned on, document finalisation was not working. This was due to incorrect primary key being used by Synergy for determination of auto-finalisation setting. This bug is fixed on this version.
- ✚ We have added a new security group to allow sites to specify who in the organisation should receive the license expiry warning. By default, everyone will receive the license expiry warning unless this security group is defined and is attached to at least one active staff member excluding System Administrator. System Administrator will always be warned regardless of this security setting.



- ✚ Users can refresh the system setting in the home screen through popup menu that gets displayed from the right mouse button click. Users can now use the F5 function key to refresh the system setting. This should save one button click and assist users that are heavy users of the keyboard rather than mouse. Please note that this will only work if F5 key is not set up to display the user procedure document.
- ✚ Users can now use F3 key in tabs that have search button to load the required search form. For example, in the general tab of the Client Control Centre, users can now press F3 and load the client search form rather than clicking the search button. This feature is available from Client Control Centre, Document Control Centre, Job Control Centre, External Client Control Centre, Matter Control Centre and Workcentre. There must be a single search or advance search buttons in the tab for this to work. Tabs that have multiple search buttons will not have this feature. Please note that this will only work if F3 key is not set up to display the user procedure document.

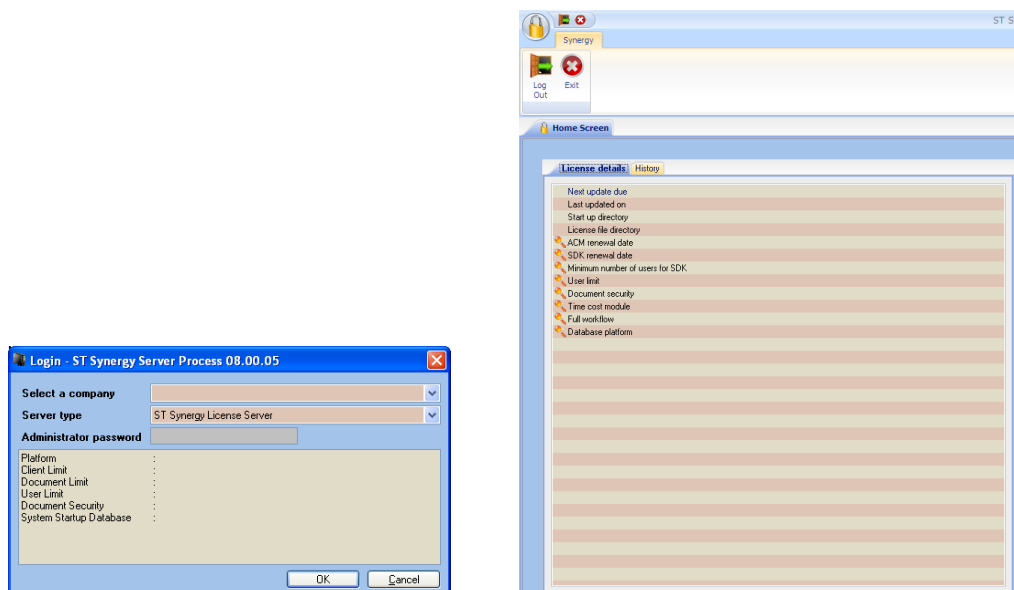
- Early versions of QuickBooks were storing the tax inclusive amount in the sub-total field of some transactions (e.g. invoices etc). In the later versions (2008-2009), they store the tax exclusive amount and in the sub-total field. We have changed Synergy to add the tax and sub-total together and display this as before in the debtor and creditor transaction lists.
- Fixed a bug in document copy process. The process was creating redundant addressee records. These redundant records were causing multiple copies of the document to be printed.
- To print word documents, Synergy was doing a mail merge to a new document and then sending this newly created document to the printer. This method was no working satisfactorily when the word document had table of contents. The printed document had “Error! Bookmarks not defined.” Instead of the page numbers in the table of content. Synergy now attempts to merge the document directly to the printer rather than creating a new document. This method has resolved the printing issue.
- Added a diary item to the Synergy shortcut bar. This will display the diary appointments for the logged user.



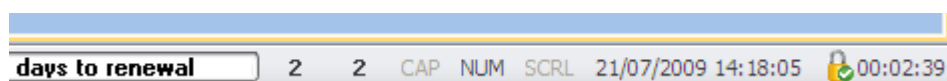
### *Modification as at release 08.00.05*

- ST Synergy has moved into a subscription model licensing. A new license server has been developed for centralised licensing. This server has been added to the normal server application that is distributed to our customers. Our customers will receive a license file which can be used with the license server. The license file is copy protected and needs to be unprotected with the license server on the PC that will always be used to run the license server. The license file must be placed in the Synergy's system directory and mapped drive to your system directory must be created for the license server to work. Please use the mapped drive to locate your start up database when asked by the license server. Please ensure that you have full access to your system directory through the mapped drive as well.

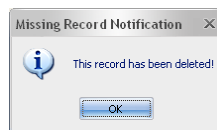
All other ST Synergy applications, including the various servers and the Software Development Kit library will need to acquire a license from the license server before they start. A license server has to run for every environment that you have. For example, if you have a development, test and live environments, each with its own start up database, then you need 3 separate license file, one for each environment and you need to run a license server for each environment. Please copy the STLisSrv.mdb from the distribution CD to you system directory. In case of multiple environments, this needs to be done for each environment.



The Synergy application has been amended to check the licensing during the day. The status bar at the bottom of the Synergy application contains a timer that indicates the time left for license verification. The license verification interval is selected randomly when the application starts for the first time and it could be any interval between 7 to 35 minutes.

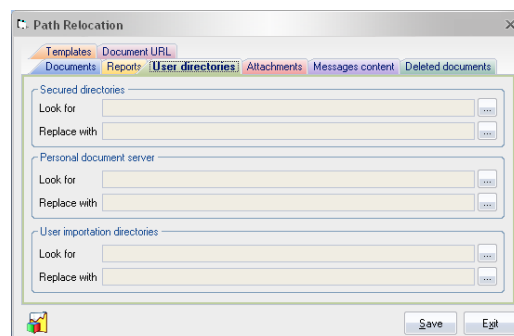


- ST Synergy now has a Software Development Kit library. At this stage, the application developers and system integrators can only create matters with the Software Development Kit. However, this will be enhanced in the future to include other entities. For pricing and licensing, please contact our head office.
- When a task is approved, in the task form, users could not scroll the guideline and pro-forma lists. The two lists can now be scrolled.
- The records in the Milestone table were being left untouched when matters were approved. These records are cleaned up as matters approved.
- When clicking the properties button in the guideline tab of the task edit form, sometimes the user was getting the following message:



This error gets displayed in cases where the user has not selected any entry from the list. In rare cases, the screen starts to pass the focus between the Matter Control Centre and Task form when they are both open and after a while, Synergy was crashing due to stack overflow. This is fixed now

- The user importation directories were missing from the path relocation. This has been added to the user directory tab of the path relocation as well as the document path report that is run from that form.



- Added ability to synchronise external information via the client synchronisation process (beta release). A new table ZZSYNEXT allows sites to populate the relevant information and then the client synchronisation process will repopulate all of the data into the ZZEXTINF table. The data must have a valid account number and filing classification identifier. Those clients that populate the data from text files into the Synchronisation tables should note that they should have a fixed length field of 4096 characters for any memo fields that they are using from the external information table. If the memo fields are longer than this length, then they must be using either an access database or other types of supported databases for this process. They could also consider developing their own pre-processor and configuring the Synchronisation to run that first.
- The path relocation report was not including the per-processor setting from the Client Synchronisation in the report. This is now added to the report.
- When copying text files into the synchronisation tables (ZZSYNCLI, ZZSYNDET etc), we have made a few changes to improve the error logging.

The synchronisation process now checks for duplicate account numbers in ZZSYNCLI, ZZSYNDET and ZZSYNBPY tables and logs them before exiting. This should give users better information in locating and removing the duplicate records before running the process again. We have also changed the way associations have been treated. The synchronisation process now attempts to change all association additions to updates if it finds an existing association in the database. Please note that only client account number, member account number and the association types are considered for this check. If the text files include duplicate associations, then the duplicates are logged in the log file but the process continues on rather than being exited. The log file will contain the record number in the ZZSYNREL, the UniqueID found from the ZZRELCLI, the client and member account numbers. This should give users enough information to remove duplicates should they wish to do so in the future. These duplicate associations will be added to the database.

- ✚ Changed the Synchronisation process to dynamically set the date formats based on the language setting of the PC that it is running on.
- ✚ Fixed a bug in launching documents. When application type was set to use a specific executable, the last user identifier, date and time was not being updated. This is fixed now.
- ✚ When matter constraints were turned on, turning them off was not working correctly. This is fixed now.
- ✚ We have created a Software Development Kit that allows sites to create matters from other applications. For licensing and pricing details, please contact our head office.
- ✚ Minimum, maximum and default value for additional data was allowing inconsistent data to be entered. Validation has been put in place to ensure that the default value is always between the minimum and maximum values. There has also been validation of the minimum and maximum values. They will be swapped if the values are inconsistent.
- ✚ PDF conversion from Synergy was not processing bookmarks in converted documents. This is fixed now.
- ✚ Added a new report to the task edit form allowing users to print the general task details. Please copy ZZJOBDET.RPT into your system directory.

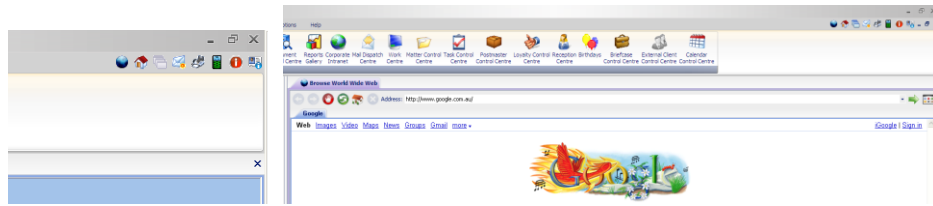
The screenshot shows a window titled "Task: In progress" with a ribbon bar at the top containing tabs: Guidelines, Templates, Chronology, Timesheets, Summary (selected), Production, Documents, Pro-formas, Communications, Messages, Follow-ups, Diary, and Clients. The form contains the following fields:

- Client ID (text box) and Client rating (text box)
- Client name (text box)
- Matter no. (text box) and Description (text box)
- Task type (text box)
- Ref no. (text box)
- Display name (text box)
- Date received (text box) and Target date (text box)
- Responsibility (text box) with "(For the matter)" label
- Approval by (text box) with "(For this task)" label
- Estimated (text box) and Estimated time (Min) (text box) with a "High priority" checkbox
- Instructions (text area)

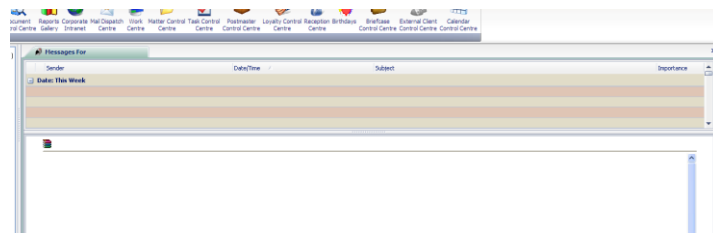
At the bottom right of the window are three buttons: Approve, Save, and Exit.

- ✚ Added a browser button to the ribbon bar. The browser button will open a form that allows users to access the Internet. Obviously, you must have internet access to be able to use this form. You can open the web sites on the

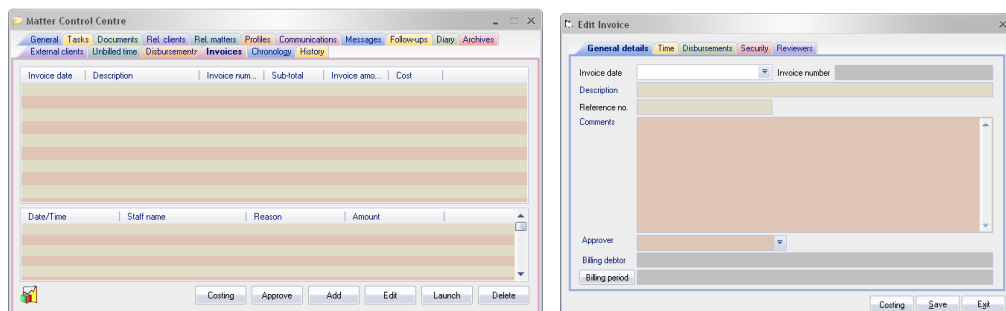
same window or click the “New Tab” button (right most button on the form’s toolbar) to open the browser in a new tab. The browsing history is cached in memory while the application is running. The first browser window will open in your Internet Explorer home page.



- The message list of the Client Control Centre and Matter Control Centre is changed to a sortable list. We have also added an expand button to these tabs that will allow users to load the displayed messages in a new form (in maximised state). This will allow users a better view of the messages. Please note that only messages that are currently displayed in the list will be displayed on this new form. Currently, the only feature available on the new form is viewing the message by double clicking a message item. We may extend the features available from this new form in the future.



- The message desktop displayed on the main window was restricted to screen with height resolution of 1024 pixel or higher. We have changed this to allow the display of the message desktop for with height resolutions of 768 pixel and higher.
- During the invoice creation/approval process in the time costing system, often it would be useful to know whether there are other unbilled items in the system for the client. Those included in the invoice can be easily seen in the list. However, to know whether there are other unbilled time or disbursement entries for the client, one must go to the Client Control Centre and click the “Costing” button in the “Matters” tab. We have made a costing button available in the “Invoice” tab of the Matter Control Centre and invoice creation form to make this process easier.

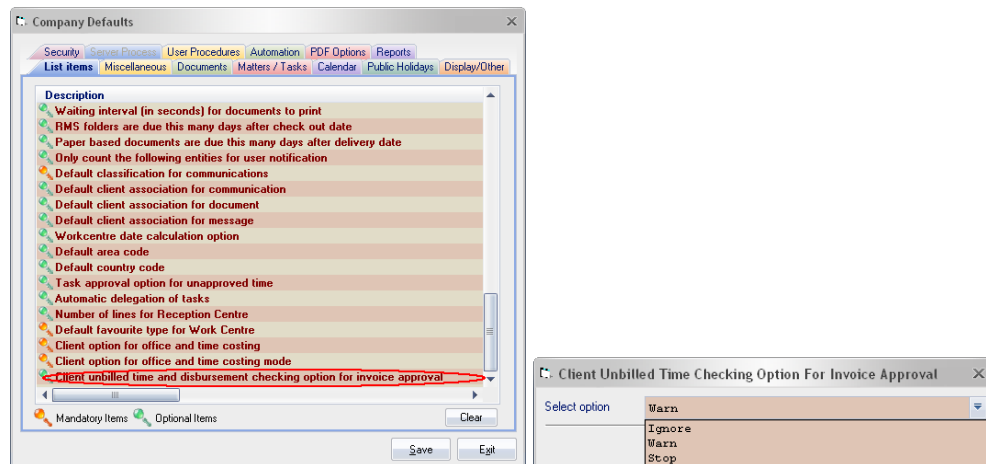




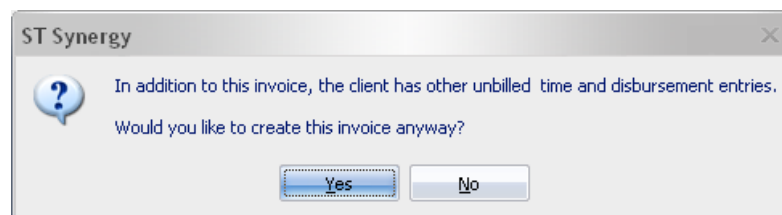
Please note that when the costing form is loaded from the invoice creation form, depending on the tab that is currently selected in the invoice form, the unbilled list may be different. For example, if you are in the general tab, the unbilled list will display all matters containing either non-zero time or disbursements. However, if you select the time tab and click the costing button, you will only see the matters that have unbilled time. Matters without unbilled time will be filtered out of the list. Similarly, when you are in the disbursement tab, matters with unbilled disbursements will be displayed. Those with no disbursements will be filtered out.

You should also remember that when you load the costing form from the invoice creation form, a button on the unbilled section of the form, allows you to select a matter for invoicing. This will greatly reduce the number of key strokes that is required to include time from other matters.

All of the above amendment will allow manual inspection of unbilled time and disbursements. However, in many cases, users may forget to do this. To assist minimising the amount of invoice processing, we have added a new option to the house keeping to allow sites to specify whether the system should ignore, warn or stop a user from approving or creating invoices when there is other unbilled time and/or disbursement for the client. This can be set from the list items tab of the company defaults. The checking will be done during the creation of the invoice as well as approval.

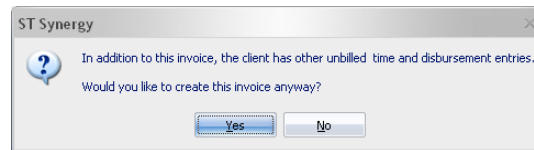


Ignore, warn and Stop are the only available options for this setting. Setting this option to “Ignore” will allow Synergy to behave identically to how it was in previous versions. When set to “Warn”, the following message box allows user to decide what needs to be done. Please note that the word “create” will be changed to “approve” if this test is performed during invoice approval.

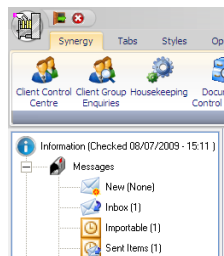




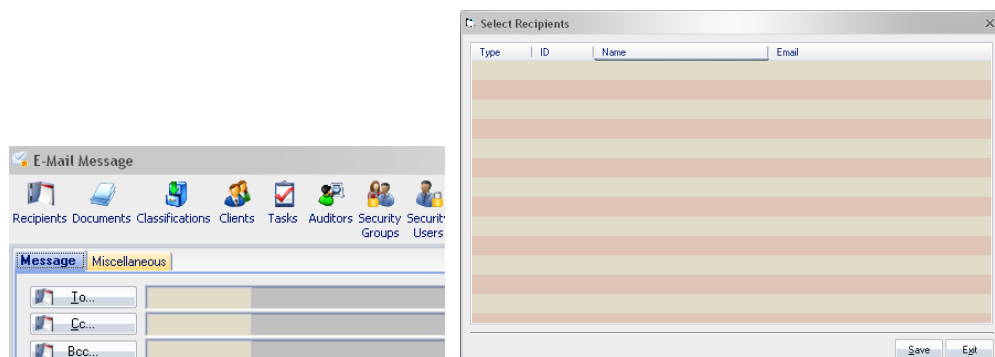
However, setting this option to “Stop” will not provide any choices to the user and will stop the invoice approval process. A message will be displayed to let the user know this. Similarly, the word “create” will be replaced by “approve” if the checking is done during the invoice approval process.



- For those customers that wanted the ability to drag and drop items from their outlook sent items, we have added a “Sent Items” node in the short cut bar. When selected, the email window on the desktop will display the emails from the sent items and the user should be able to drag and drop the email similar to the outlook inbox.



- In the email form, we have added an entry field to each of the recipient lists. The users can now enter names or Email addresses in the entry field. Synergy will do a match on the entered data and if it finds a single matching entity in the system, that entity will be added to the list. If Synergy finds more than one entity, then a list will be displayed so that the user can select from those matched. Clients, External Clients and users are the only entities that are searched. If there is no Email marker “@”, then Synergy will do a name search. If there is an Email marker, then the Email addresses will be searched. Similarly for faxes and SMS, if you enter all numeric values, then fax or mobile numbers will be searched. Any other characters will force the application to do a name search. Use “\*” for wild card search



- When creating a non-document mail item, Synergy allows users to override the delivery address. However, in many cases, the deliver address could be the address from another client in Synergy. We have added ability to set the deliver address of a non-document mail item from other clients. We have also

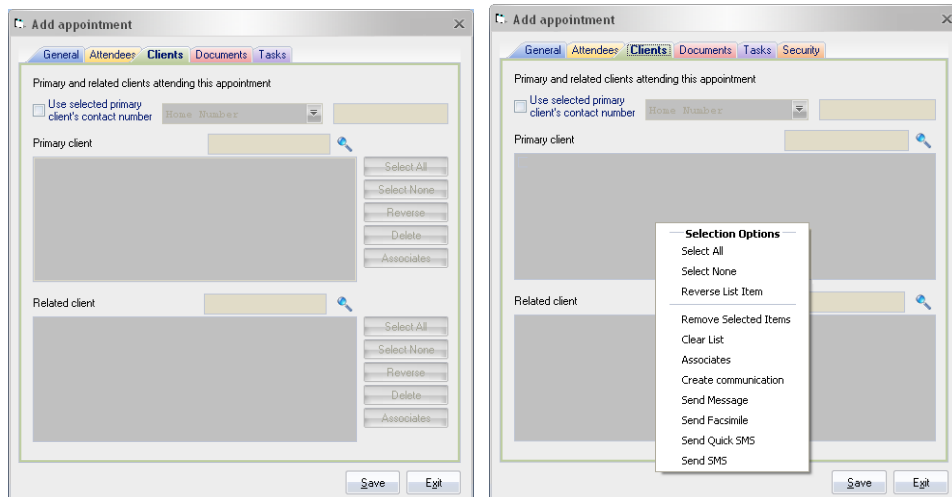
added a drop down that allows users to select different address types. Please note that the client that is used for delivery address is not stored anywhere in the database and is not linked in any way to the mail item.

Sometime, users may need to forward the imported emails from outlook to other internal recipients. This can be done by editing the email during the importation and adding the intended recipient to the CC list. It could also be done by importing the email first and then forwarding that email to the intended recipient. Although the second approach is inefficient, it has the added advantage of allowing the user to place an appropriate subject on the forwarded email whereas in the first approach this is not possible. To increase efficiency in importation and routing of emails, we have placed a setting in the company defaults that allows users to change the subject line of the message when they are importing them. Please note that this feature will only be available when editing the email during the importation process.

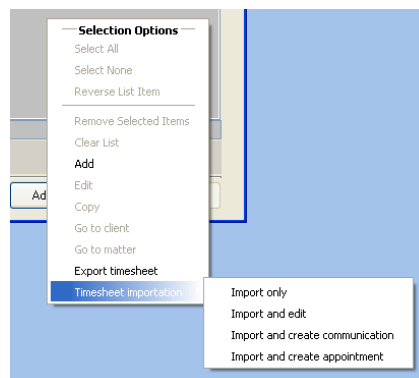
Users can refresh the system setting in the home screen through popup menu that gets displayed from the right mouse button click. They can now use the F5 function key to refresh the system setting. This should save one button click and assist users that are heavy users of the keyboard rather than mouse.

Please note that this will only work if F5 key is not set up to display the user procedure document.

- In the appointment form, we have removed the selection buttons and replaced it with a popup menu. We have also added extra features in the popup menu that allow users to create communication, send messages, fax or SMS to the selected clients. Obviously, the selected clients must have the email address, fax number or mobile number if needed. The application will warn the user if the selected clients do not have the required info. If no client entry is checked, then the highlighted client will be used for the process.



- In the timesheet tab of the Workcentre, users can import timesheet entries from external files like Microsoft Excel, text file, Access and FoxPro database files. This could be done by selecting the proper menu item from the popup menu. We have added two new menu items to allow users to create either communication or diary appointments after the successful importation of each timesheet entry. The application will display either communication form or the appointment form as required. The form will copy the client and the matter and task from the time sheet entry. The date and times as well as any comments will also be copied to these forms. This should reduce the effort required to enter these entities when all of them are done out of office.



- Users can now use F3 key in tabs that have search button to load the required search form. For example, in the general tab of the Client Control Centre, users can now press F3 and load the client search from rather than clicking the

search button. This feature is available from Client Control Centre, Document Control Centre, Job Control Centre, External Client Control Centre, Matter Control Centre, Workcentre. There must be a single search or advance search buttons in the tab for this to work. Tabs that have multiple search buttons will not have this feature. Please note that this will only work if F3 key is not set up to display the user procedure document.

- ✚ A new column has been added to the later versions of Elite Tax system (eft\_code). Synergy was not processing this column when it was attempting to create new clients in the Elite Tax system. This is fixed now.
- ✚ When creating appointments, the start and end time can be set in 15 minute blocks. We have changed this to be in increments of 5 minutes.

*Modification as at release 08.00.04i*

- ⊕ Fixed a bug in deleting time cost entires for a user.
- ⊕ The company default was allowing non-existent drive letters to be stored in the documents tab. This is fixed now.
- ⊕ The document URL details were not being reset after processing in the path relocation form. This is fixed now.

***Modification as at release 08.00.04h***

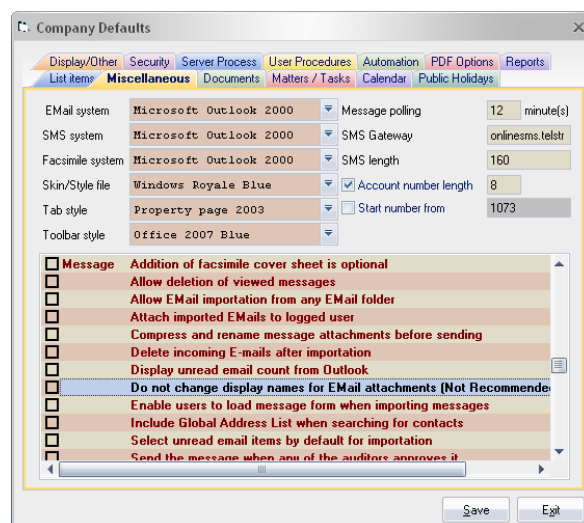
- ⊕ Some versions of QuickBooks (QBi) were not returning vendor full name. Consequently, the vendor list was left with a blank name in the link to accounting form. Synergy will now display the name if the full name is not returned by the QuickBooks.
- ⊕ Also there was a bug in linking a client to an accounting system. In certain cases, Synergy was not deleting the accounting link in the Synergy database. This is fixed in this version.

### *Modification as at release 08.00.04g*

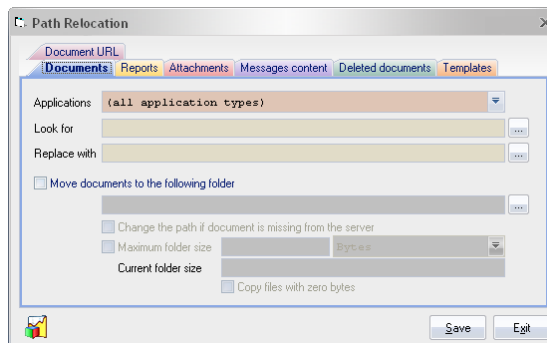
- ✚ Importation of timesheet entry was allowing users to select timesheet types that were linked to tasks. These timesheet types are now filtered from selection for importation process. The importation was also trying to process records with blank start date. We have also placed some validation to ensure that the start date and time are valid date and time before importing the record.
- ✚ Added a new setting to the house keeping that allows sites to enforce renaming and compressing of the email attachments before sending them via the Outlook. Please note that only document name will be used for renaming the documents since using client names may create inconsistencies and problems.



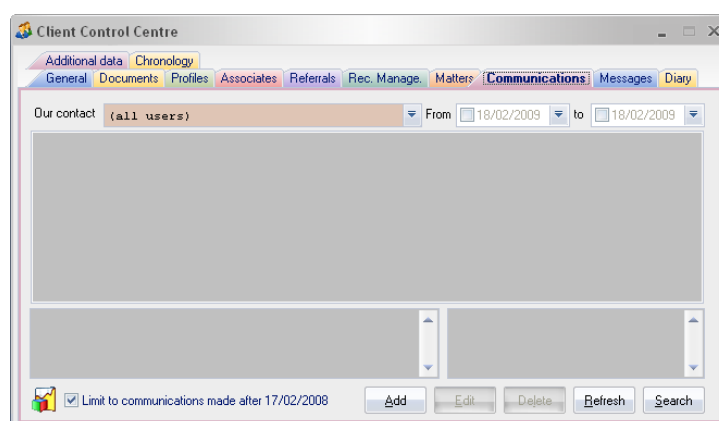
- ✚ We would like to remind the users that the following option from the housekeeping has no affect in the Microsoft outlook 2003, and 2007 since these versions of Microsoft outlook uses the file name as the display name. In earlier versions, outlook used to give precedence to display name property over the file name but Microsoft has changed this behaviour (they claim that it was done for security reasons, you be the judge).



- Added the document URL to the path relocation form. Also included the document URL table to the report that runs from this form.



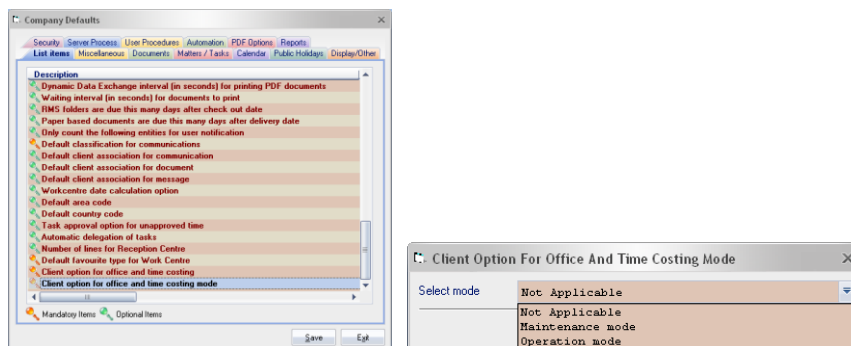
- When bulk importing documents from the task form, depending on the company setting, the user could be asked to specify whether imported documents should be finalised or not. In previous versions, the finalisation flag from application types were overwriting the user's decision. We have amended the code so that the user's answer will be the one that is considered during the process.
- In the task form, when creating a pro-forma document, it was not being linked to the task. This is fixed now.
- When adding a client from the client list to the recipient list of a message, the tooltip was not showing the email address. This is fixed now.
- Added an advanced search button "**Search**" to the communication tab of the Client Control Centre. This will allow users to use the advance communication search form to display a limited number of communication records for client. Please note that the advance search criteria will always be used when refreshing the communication tab until the user drop down or dates are changed. Once any criteria are changed on this tab, the advance search filter will be removed. We have also changed the date fields to a date time picker control.



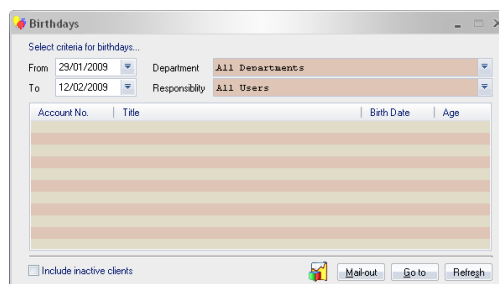


### *Modification as at release 08.00.04f*

- ✚ The security group list was not refreshing when the message form was loaded. This is fixed on this version.
- ✚ Made the synchronised check box invisible while composing a new message. Synergy will synchronise the message is a MSG file get created by default during the send process. Once the message is sent, subsequent viewing of the message will display this check box.
- ✚ When we extended the client based timecost system to include a setting to specify when this option is operational. This can be set from housekeeping's List Items tab. In Maintenance mode, the system will record timecost entries as before and ignores the client inclusion/exclusion. Once this setting is changed to operation mode, the system will use the client list for addition of timecost records.



- ✚ We have added user and department drop down to the Birthday Control Centre. This will allow clients to be filtered by their responsible person and department. We have also changed the date entry fields to use a date picker control.



- ✚ When running reports or mail merging from Birthday Control Centre, sometimes Synergy was unable to build the table for the report. Using bulk insert with rows exceeding the size limit generally create this error. We have changed the way the report table is built by copying the content manually rather than relying on bulk insert. This change has fixed the error.
- ✚ For mail out from the Birthday Control Centre, not all merge fields were made available. We have changed Synergy to recreate the merge table and hence make the standard merge fields available. Please note that this will effectively remove the age column that was available in previous versions and will make other standard merge fields available for merging. To add the age of your client you can use macros, fields or VBA in your master document. The

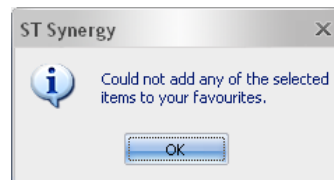
following examples display a simple approach for calculating a client's age using the word formulas:

Use current date for calculation:

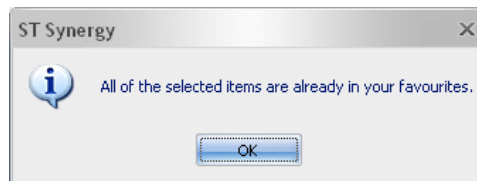
`{ = { DATE \@ "YYYY" } - { MERGEFIELD "BIRTHDATE" \@ "YYYY" } }`

You can substitute the "DATE" with any date field that is available. Please also note that you need to use F9 key to refresh these fields.

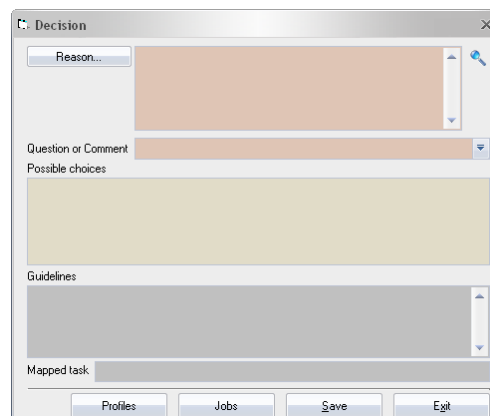
- ✚ In the login form, the selected company's colour scheme for drop downs and text boxes were not being used. Synergy now extracts the colour scheme for the selected company and applies it to the logon form.
- ✚ There was a bug that allowed addition of existing profiles for clients. This is fixed.
- ✚ When adding favourites that were already in a user's favourites, Synergy was displaying the following message:



This message is change as follows:

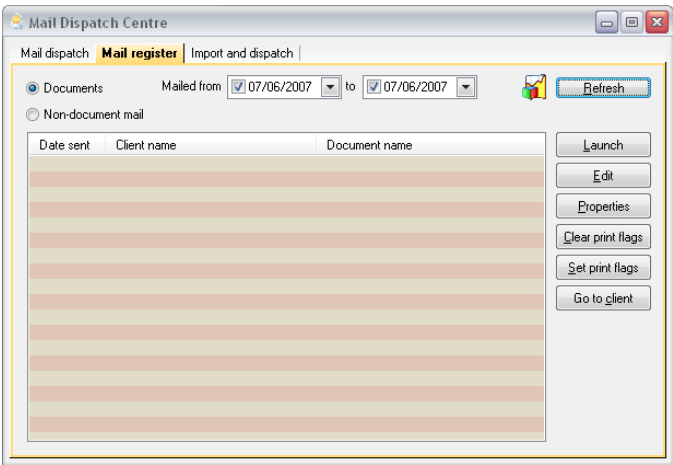


- ✚ Added a button to the user decision form to allow users to inspect the existing profiles for the matter or the primary client of the matter. This would help situations where the answer will profile the matter or client and the user needs to know what other profiles exists in the system.

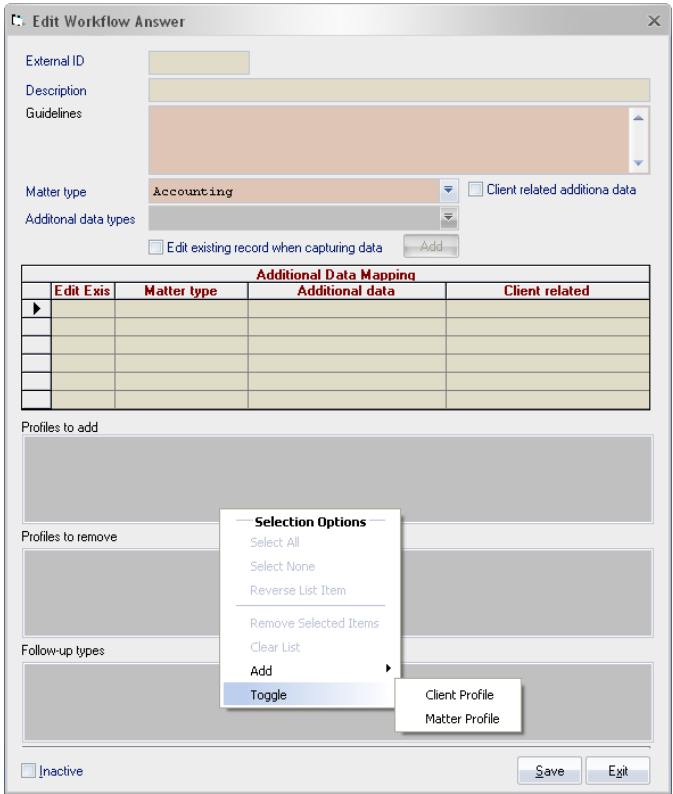


- ✚ Added a new button to set the print flags in the Mail Dispatch Centre. This will allow users to set the print flag for mailing labels and then print the labels in one go. In the previous versions, the users had to set the print flag for each one of the mail items individually. However, if there are hundreds of

documents that need mailing labels, it will take some time to set these flags manually.



- Added ability to add or delete both matter and client related profiles when a decision is made on a workflow. In previous versions, one could only add/delete a profile from either the matter or the client not both. We have also added ability to make an already selected profile matter/client related by using a toggle menu. Please note that if you toggle client and matter related flags off, this will remove the entry from the corresponding list. Please note that you can only toggle the profile on, if the profile is allowed to be linked to the relevant entity types (client or matter).



*Modification as at release 08.00.04e*

- ✚ Synergy determines the default country of the user from the regional setting of the PC. We have amended the suburb and post code search form to use this default country if no information has been passed from the client edit forms.
- ✚ When there are many thousands of documents present in the document list of Email/Fax client form (documents tab of Matter Control Centre), an out of memory error may be generated. This error occurs after the validation and before the creation of messages. We have amended the code to overcome this error in this version.

*Modification as at release 08.00.04d*

- When sending email messages externally, Synergy was not synchronising the security groups and users between the message and the message file. The security groups and users are now synchronised from the email message to the message file.
- Synergy stores a single follow-up type for placing tasks on hold. After enhancing the matter types and allowing follow-up categories to be related to a matter type, we have amended the way we select the follow-up category when placing tasks on hold. If a company has a default follow-up type set at the company defaults form, then Synergy will use that follow-up type. Otherwise, if a follow-up category is linked to a matter type, then that follow-up category will be selected. Please note that in both cases, the follow-up category and type must be active.
- Added a “Clear comments” button to the follow-up form.

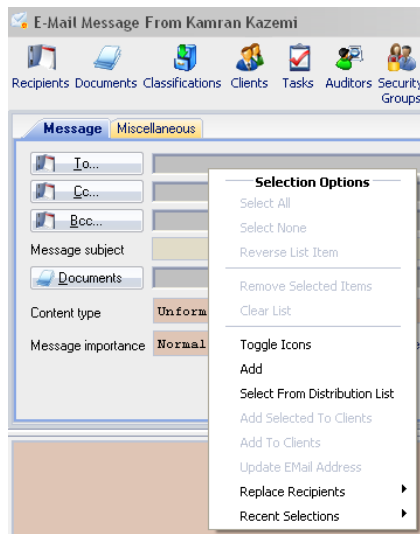
The screenshot shows a window titled "Add Follow-up". It contains several input fields and buttons. The "Comments" field is highlighted with a blue cursor. The "Clear comments" button is visible below the "Comments" field. The "Save" and "Exit" buttons are at the bottom right.

- The notes button on the CCC was not being bolded when there was internal note for a client. This is fixed.

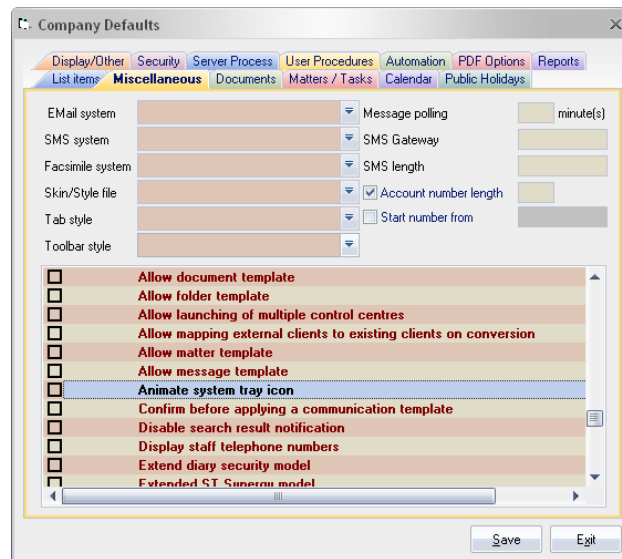
The screenshot shows a window titled "Client Control Centre". It has a menu bar with "Additional data", "Chronology", and "General". The "General" tab is selected. It contains various input fields and buttons. The "Notes..." button is highlighted with a blue cursor. The "Active" checkbox is at the bottom left. The "Add", "Edit", and "Delete" buttons are at the bottom right.



Added a “**Replace Recipients**” and “**Recent Selections**” to the popup menu of the “**To**”, “**CC**” and “**BCC**” recipients.



We have added ability to turn off system tray icon animation. This is located in the list box of miscellaneous tab in the company default form.



*Modification as at release 08.00.04c*

✚ Using rich text format for sending Emails from Synergy was not working in Outlook 2007 environment. The message was being sent with a blank content. There are mainly two reasons for this:

1. You are not using Rich Text Format as your default mail format (check Outlook 2007 Tools⇒options⇒Mail Format).
2. Synergy is using the mail item to set the body of the email and does not display it after the body is set.

In fact, Synergy attempts to change the message format automatically which worked fine in all previous versions of Outlook. However, this ability seems disappeared from Outlook 2007. Nevertheless, users can set this up manually by using Tools⇒options⇒Mail Format.

The second issue seems to be even harder to fix. In all previous versions of Outlook, Synergy was setting the mail content and then sending it without any problems. However, starting from Outlook 2007, this would not work since Microsoft has change the way Outlook object model works. To send an email in Rich Text Format, Synergy has to display the composed message before sending it. It seems that Microsoft outlook objects do not set the content of emails until the email is actually displayed to the user.

Because of the above changes, we have changed the email sending method to use the mail item's inspector object. As mentioned above, the mail item also has to be displayed momentarily so that the content of it is refreshed by Outlook 2007 objects before being sent.

Please note that since Microsoft is making access to outlook object model harder in new versions of office, we might consider moving away from using Outlook object model for routing and importing messages and use Extended MAPI objects. This might give our customers some advantages like bypassing Outlook security guard, ability to send via any MAPI compliant email system and possibly faster response time in some instances. However, this has not been evaluated yet. We will consider all of the email functionality that Synergy provides and would only consider using Extended MAPI objects if these functionalities can be preserved with ease.

### *Modification as at release 08.00.04b*

- ✚ In previous versions of Synergy, we had made provision for finalising documents on creation through a setting for the application types. However, it was not implemented due to time constraints. In this version, administrators can define the types of document that should be finalised upon importation, creation or scanning. Please note that the finalisation will only be done if the document properties form has been displayed and the document is not marked as pending. Exception to this rule is when the scanning form is loaded from the documents or postmaster tab of the Workcentre or Postmaster Control Centre, this will only work if you scan from a client or a task.

The 'Edit Application Types' dialog box contains the following fields and controls:

- Application name: Text input field.
- Default file extension: Text input field.
- ☐ OLE / pre-defined class: Check box with a dropdown menu.
- Default document direction: Text input field with a dropdown arrow.
- Application executable file: Text input field with a 'Clear' button.
- Application startup directory (leave blank if always same as the executable file path): Text input field with a 'Clear' button.
- Command-line edit switches: Text input field.
- Command-line merge switches: Text input field.
- Command-line print switches: Text input field.
- ☐ Documents of this type can be included in facsimiles: Check box.
- ☐ When creating documents of this type, finalise them: Check box.
- Buttons: 'Save' and 'Exit'.

- ✚ Added the number of sessions per host to the list of logged users.
- ✚ In the previous versions of Synergy, the addressees in the addressee list were being saved all the time. In some cases, e.g. when the document is finalised, the user cannot change the addressee list anyway, so saving these addressees were not necessary. Also, when the primary client list is not changed, then there is no need to save addressees because addressees must be a primary client.

The 'Document Properties' dialog box, 'Addressee' tab, contains the following elements:

- Tabbed interface: Identification, Classification, Clients, Key words, Misc., Preview, Tasks, Security. Sub-tabs: Addressee, Pro-formas, Guidelines.
- Primary clients for this document: Large text area with 'Assoc.' and 'Assoc. type' buttons on the right.
- Clients to whom this document is addressed to: Large text area with 'Delete' and 'Clear' buttons on the right.
- Buttons: 'Save' and 'Exit'.



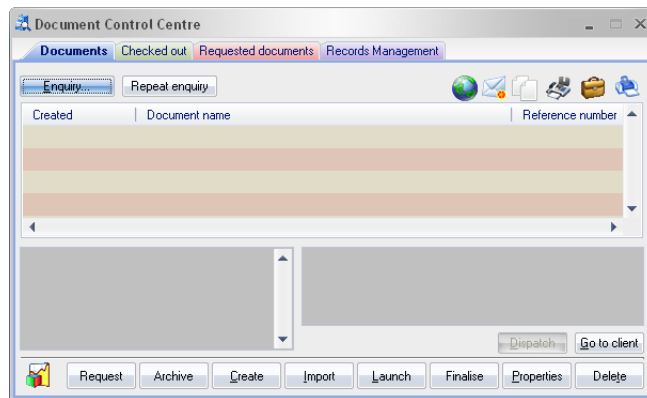
- ✚ We have added a dispatch check box to the scanning form. When this check box is selected, the scanned/imported document will be dispatched if possible. Please note that this feature will only be available when scanning from a client or a task. When the dispatch check box is selected, the document will be marked for dispatch automatically. The document will be finalised during the dispatch process as well. Users must select a client to dispatch the document to.

The 'Create Workflow' dialog box is divided into several sections. The 'Document options' section includes a 'Template' field with 'Locate', 'Clear', and 'View' buttons, and a 'Scan/import only' checkbox. The 'Primary client options' section has a checked 'Attach to an existing client' checkbox, a 'Client ID' field with a 'Favourites' button, and an unchecked 'Create a new client' checkbox. The 'Related clients' section features an 'Automatically relate associates' checkbox, a 'Related client ID' field with 'Favourites', 'Associates', and 'Documents' buttons, and a list box. The 'Matter options' section includes 'Attach to an existing matter' and 'Create a new matter' checkboxes, a 'Primary profile' dropdown, a 'Delegate to the following user or team' checkbox, and an 'Additional profiles' table with columns for 'External ID', 'Description', and 'Status'. The 'Other options' section contains a 'Send Email' checkbox, a 'Notes' field with a 'Notes' button, an 'Archive in' checkbox, and a 'Dispatch scanned/imported document' checkbox. At the bottom are 'Import', 'Reset', 'Scan', and 'Exit' buttons.

- ✚ When dispatching a document item, Synergy will now copy the comments of the stored in the document meta data to the comments section of the dispatch record.

The 'Dispatch Document' dialog box contains the following fields: 'Dispatch date' and 'Dispatch time' text boxes, an unchecked 'Override address' checkbox, a 'Reference number' text box, a 'Delivery method' dropdown, a 'Delivered by' dropdown, a 'Receipt number' checkbox, and 'Date' and 'Time' text boxes. Below these are 'Document ID', 'Document name', 'Client ID', 'Client name', 'Trading as', 'Client addresses' dropdown, 'Delivery address' text box, 'Suburb' text box, 'Postcode', 'State', and 'Country' text boxes, and 'BSP', 'Barcode', and a text box. A large 'Comments' text area is at the bottom. At the very bottom are an unchecked 'Label required Mail Center' checkbox, and 'Save' and 'Exit' buttons.

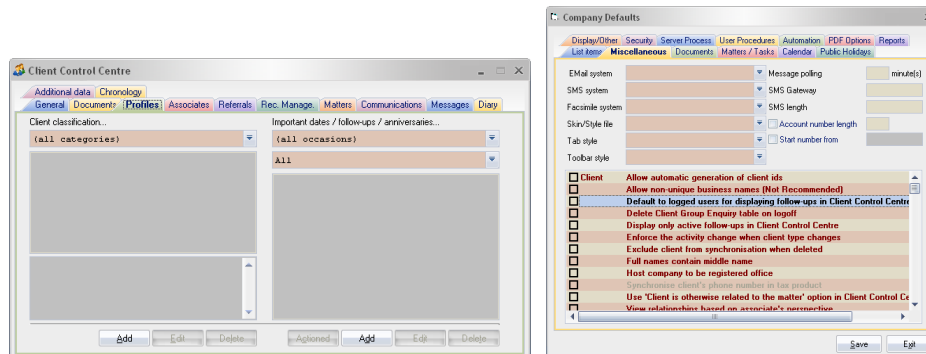
- ✚ The document report has changed to display all of the documents from the list in the Document Control Centre. In the previous versions, it was only displaying list entries that were attached to clients. The report also has been redesigned to sort the documents by name and then creation date. The clients are also moved to the end of the report and will be listed under each document. The document details will not be repeated in a document has multiple clients. Please copy ZZDOC.RPT to your Synergy system directory if you have not customised this report.



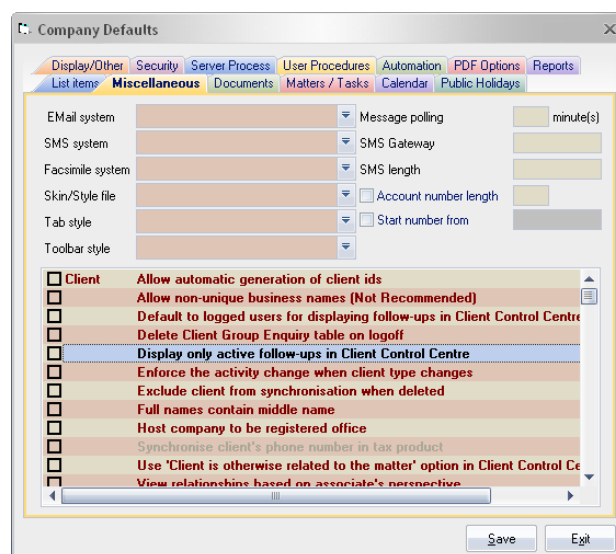
- ✚ Using rich text format for sending Emails from Synergy was not working in Outlook 2007 environment. The message was being sent with a blank content. We have changed the email sending method to use the mail item's inspector object. We also had to display the mail item so that the content is refreshed by Outlook 2007 objects before being sent. Please note that since Microsoft is making access to outlook object model harder in new versions of office, we might consider moving away from Outlook object model for routing and importing messages and use Extended MAPI objects. This might give our customers some advantages like bypassing Outlook security guard, ability to send via any MAPI compliant email system and possibly faster response time in some instances. However, this has not been evaluated yet. We will consider all of the email functionality that Synergy provides and would only consider to use Extended MAPI objects if these functionalities can be preserved with ease.

### **Modification as at release 08.00.04a**

- Added a user dropdown list to the follow-ups in the Client Control Centre. This allows users to pick an active user or team and see the follow-up for that user or team only. The default can be set to the logged user from the housekeeping.



- The follow-up list in the Client Control Centre displays all of follow-ups for the client. As time goes on, this list will be cluttered with the follow-ups that have been actioned and inactivated. We have now added a new setting to the housekeeping that allows removal of inactive follow-ups from the follow-up list from the client control centre. Please note that turning this setting on will affect all users.

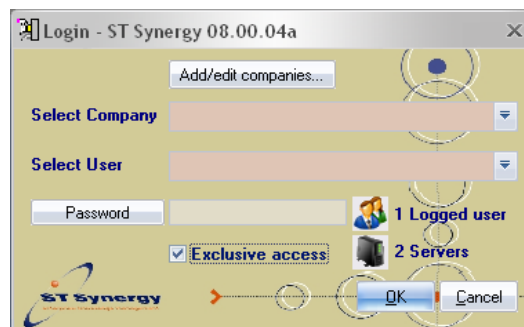


- The follow-up report has been changed to include the comments from the follow-up. Please copy this report "ZZANNIVR.RPT" from the CD to you system directory.
- When emailing documents from the document tab of the Client Control Centre using the email button at the top of the list, the client was not being added as the recipient of the message. Synergy will now add the client as the main recipient of the message.
- Exporting data to Microsoft Excel in office 2007 environment was producing errors. This was due to the file format that was used. Synergy is amended to

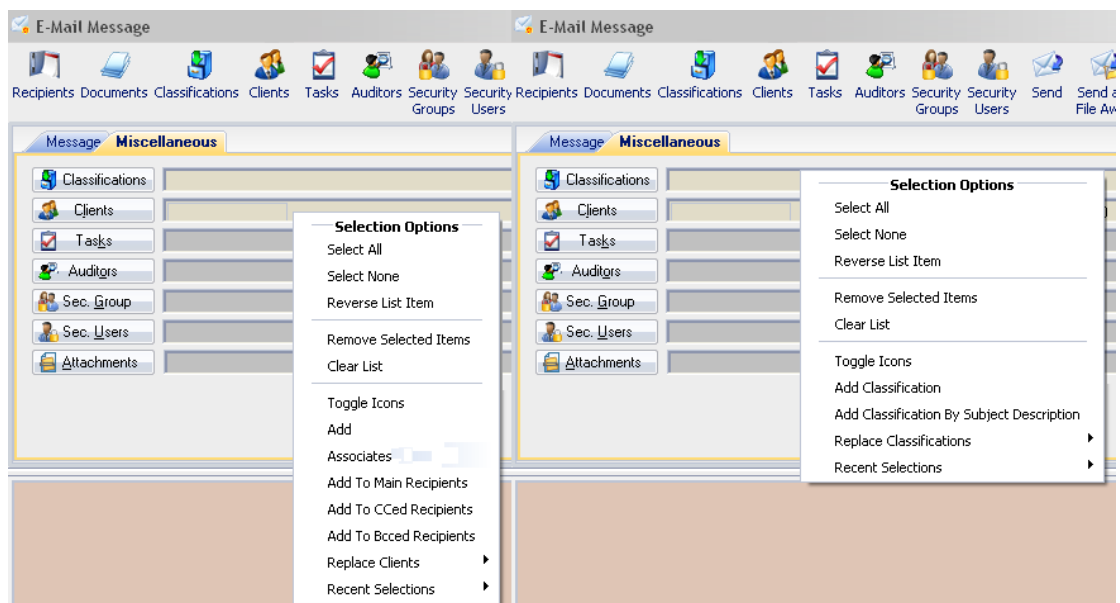
create Excel files in office 2007 environment with Excel 8 format. This has fixed this problem.

When changing companies in the login form, the newly selected company's skin file was not being used. This is fixed.

On login form, when the exclusive check box is ticked, Synergy will show the number of currently logged users and the currently running servers in the login form. This will help the System Administrators in ensuring that users are logged off before critical configuration changes are applied. Clicking any of the icons on the login form will list the currently logged users (currently running server if server button is clicked) to be displayed. Please note that this is only done when the user checks the exclusive check box. We also note that the change password button is now moved to the left of the password field.



We have added new menu items for classifications and clients in the message form to keep the 10 most recently selected classification and client. The user can now select client and classification from this list. This will help users to add classification and clients quickly to email. The list will also be added to the replace menu so that you can replace the selected items with the most recently used item. Use the first sub-menu (Search) to use the search form for item replacement.





On the document replacement symbol, using clear and then reset buttons were not reinstating the original document on document based replacement symbol. This is fixed now.

Description	Symbol	Replacement	
Paragraph 1	<PAR1>		Reset
Paragraph 2	<PAR2>		Reset
Paragraph 3	<PAR3>		Reset
Paragraph 4	<PAR4>		Reset
Paragraph 5	<PAR5>		Reset
Paragraph 6	<PAR6>		Reset

Items in bold are mandatory

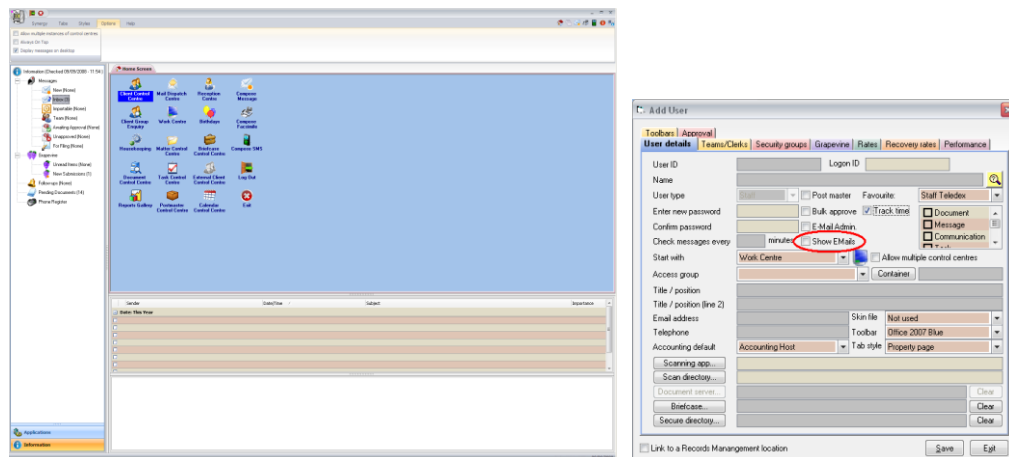
Save Exit

### Modification as at release 08.00.04

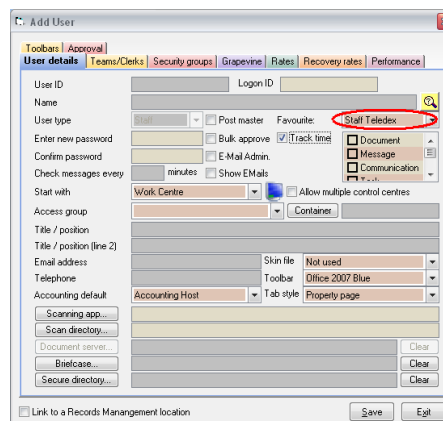
- Added a new section to the synergy desktop to display the user messages. This section is synchronised with the information shortcut bar. When you click a message node on the shortcut bar, the relevant messages are displayed on this new section of the synergy desktop. You can drag and drop the emails from this section of the desktop to client control centre, task tab of the matter control centre or task edit form. In doing so, you are linking the dragged items to the corresponding entity. Content and attachments of a selected message is also displayed below the message list.

Attachments (those entries with prefix “Attachment –”) from the attachment list can also be drag and dropped from this section. If attachments are stored in Synergy, the attachment will be removed from the message after importation. Multiple selections are also available using the provided check boxes.

You can turn this feature on/off by using the “Display messages on desktop” menu from the “Options” menu or user edit form from the Housekeeping. If you use the information icon on the top right to hide/display the shortcut bar, the email section of the desktop will also be hidden/displayed.



- Added ability to specify default favourite types for each user. This can be done from the user edit form from Security tab of the Housekeeping form.



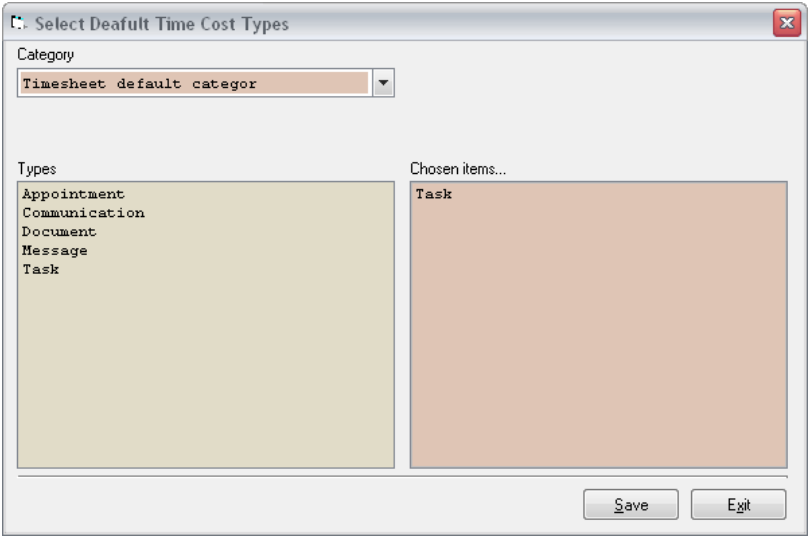


We have allowed more flexibility in terms of tracking staff timesheet entries. Sites can now specify what types of predefined timesheet entries should be tracked for each user. For instance, you could force Synergy to only log timesheet entries for documents, communications and appointment but ignore everything else. Once this is set up, only those types of timesheet entry will be logged for that user. Please note that all existing timesheets entries remain as is. Default is set to all timesheet types to preserve the existing behaviour.

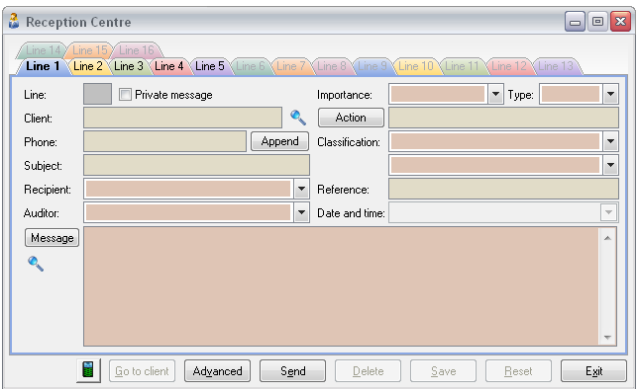


Added a task timesheet type to Synergy. This timesheet type allows Synergy to track how long the task edit form has been open. Please note that Synergy checks to see if there are any unapproved time cost entries and warn the user when approving the task. This checking is based on a housekeeping option that could be turned on/off. This check does not include the timesheet entry that gets added from the task edit form itself. So you might have an unapproved timesheet entry after the task approval. By default, this option is turned off to preserve the existing behaviour. To turn this option on, please edit each user and check the entry in the list.

- When the System Administrator decides to turn time cost on from the company defaults, Synergy will allow the SA to select the timesheet types that should be tracked. Once the relevant timesheet types are selected, the user records will be updated accordingly. Please note that when you are turning the time tracking on, you must select at least one timesheet type to be tracked.



- Added ability to specify auditor and reference number in the new reception centre.



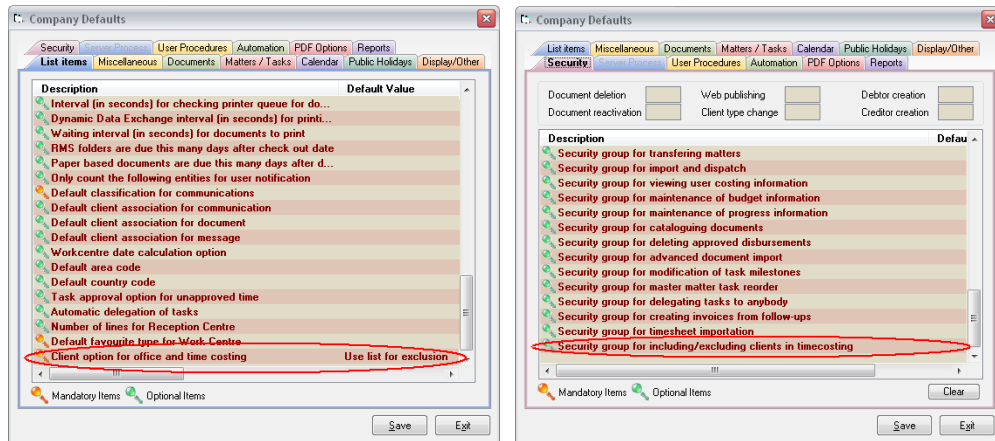
- Removed the urgent flag from the original reception centre.



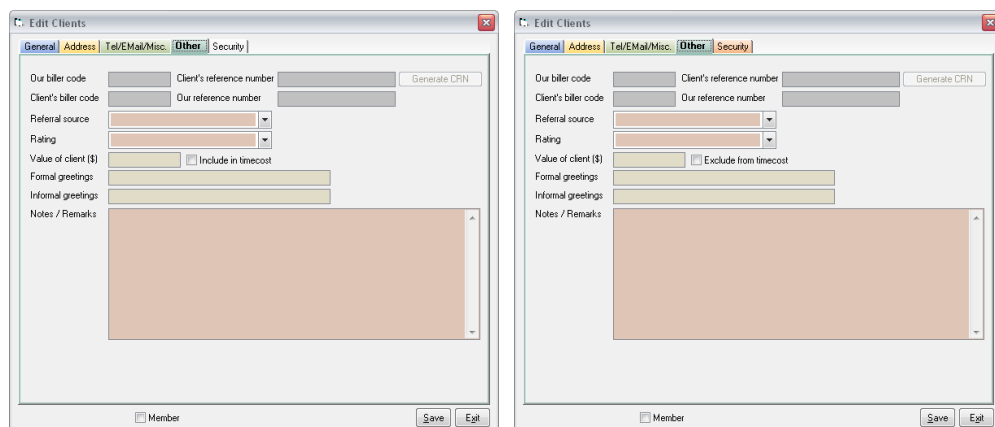
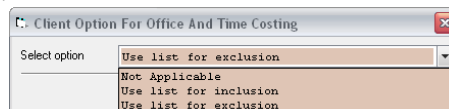




We have added new facility for sites using our time costing system to specify clients that they would like to include in the time costing system or exclude from the time costing system. A new option at the company default allows sites to configure this feature. This feature is controlled by a security group that can be set from the security tab of the company defaults. In the absence of a security group, only System Administrator can use this feature.

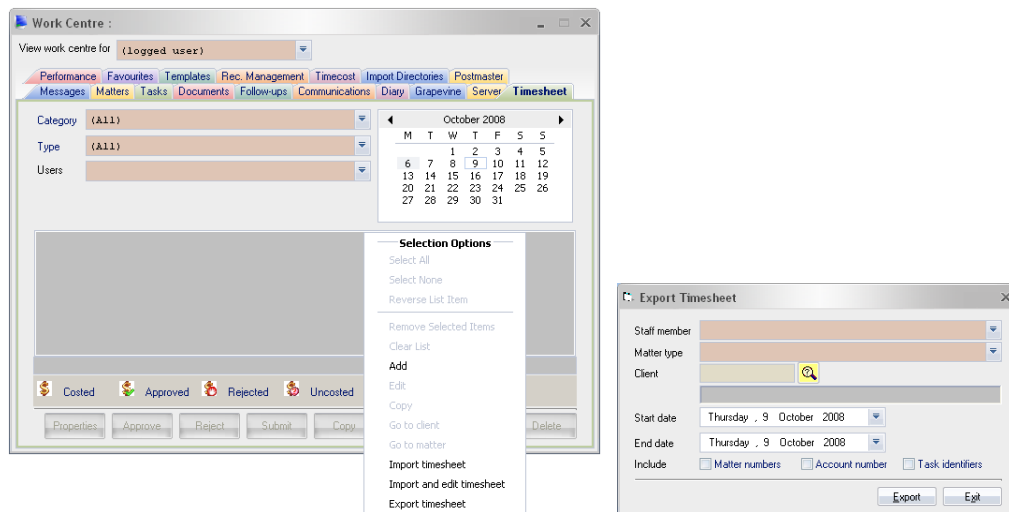


Users have three options. “Not Applicable” to turn this feature off. This is the default setting and it is selected to preserve the previous behaviour of the system. “Use list for inclusion” and “Use list for exclusion” which means that the users will be given an option to specify which clients should be included in the time costing or excluded from the time costing respectively. Once this option is configured to include or exclude, a check box will be displayed in client edit forms allowing users that have access to this feature to selectively include or exclude client. The check box will be in a disabled mode for all those users that do not have access to this feature. Please note that this option allows Synergy to control the entry, costing and approval of the timesheet entries. Already approved timesheet entries by no means are considered, they can be invoiced as before regardless of setting for this feature. When this option is changed, the system administrator will be asked whether the client list should be cleared.





Added ability to import/import and edit/Export timesheet records from the timesheet tab of the Workcentre.



Import files can be text and Excel files, Access and FoxPro tables. The following columns must be present in the file or the table:

AccountNo:	The client's account number for the timesheet record.
MatterID:	The matter number for the timesheet record.
TaskID:	The task identifier for the timesheet record.
Descrip:	The description for the timesheet record.
StartDate:	The date (dd/mm/yyyy) for the timesheet record.
StartTime:	The start time (HH:MM) for the timesheet record.
Duration:	The number of minutes for the timesheet record.
Comments:	Any comment to be added to the timesheet record.

The following rules are implemented for importation.

- 1) This function is only available for users in a specific security group. This security group can be set from the company defaults.
- 2) The date and times must be in a valid format.
- 3) Synergy will calculate the end date and end time for the timesheet record. The calculate end date must be the same as the start date, that is a timesheet entry cannot pass the day boundaries.
- 4) If a task identifier is provided, it must be valid and the task must be present in the database. Synergy will use the matter number and primary client of the matter if a valid task is provided.
- 5) If the matter number is provided, it must be a valid number and the matter must be present in the database. If a valid matter number is provided, the primary client of the matter will be used for the timesheet record. This field is only used if the matter number cannot be determined from a task identifier.
- 6) If the description is blank, the description of the description of the selected timesheet type will be used.

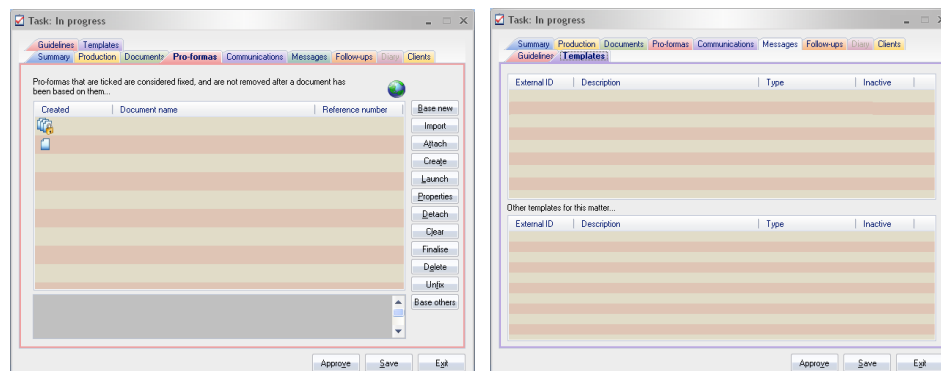
- 7) If a client account number is provided, it must exist in the database. This field will only be used if the client cannot be determined from the task or matter identifiers.
- 8) The imported timesheet entries will be attached to the user selected in the user dropdown on the timesheet tab. If this dropdown is disabled or a different user is selected on the dropdown, Synergy will ask for confirmation before importing the timesheet records.
- 9) If you are importing timesheet records for someone else, you will not be able to edit them even if you select the import and edit option. It is the user's responsibility to ensure that the timesheet entry is costed and approved properly.
- 10) Pressing exit button when editing records will abort the importation if user decides to do so.

✚ Importation of external emails from outlook was not adding timesheet records. This is now fixed.

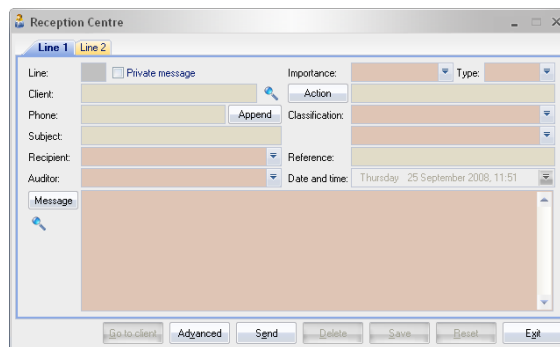
✚ When copying documents to briefcase, copying of paper based documents were being reported as failure. We now display the number of paper based documents that were not copied to the briefcase separately. Also, when naming convention is used on a site, some characters caused problem in the copy process. For example, having a "?" on the document name will cause problem when copying that document into the briefcase. We have altered Synergy delete all characters that are illegal file name characters before copying the document to briefcase.

✚ Added a report to display the document paths from the synergy database. This could be used before and after the path relocation to ensure that all UNC paths have been changed when relocating servers.

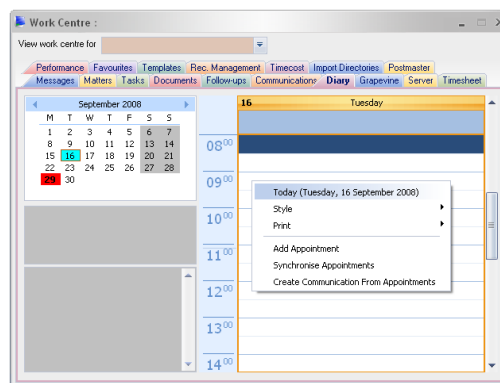
✚ Changed the Pro-Forma list in the task edit form. When a user clicked an entry to select, s/he might have inadvertently changed the check status of that entry which determined the fix to unfix (multiple, single) status of Pro-Forma. To avoid this, we have removed the check box and replaced them with proper icons. The unfixed Pro-Formas (single instance) will be displayed with a single document image where as the fixed Pro-Forma (multiple instance) will show a multiple document image with a padlock. We have also added another list to the templates tab. This list will display the templates from all other tasks for that matter and can be used to create documents, messages etc. By double clicking the entry. Please note that the double click on this new list will only work on live matters not on master matters. On master matter, this list is for view only.



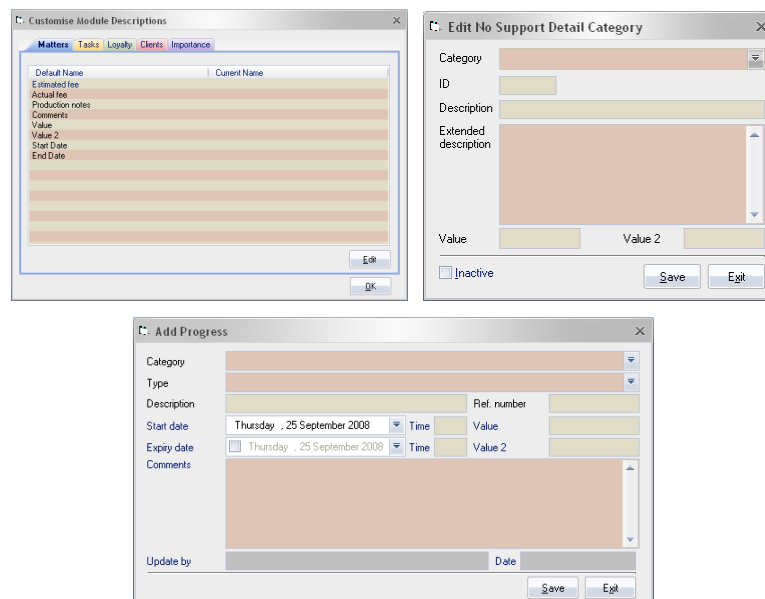
- Improved the loading time for the new “Reception Centre”. Synergy will now load only the controls on tabs that are required. Those that are not required are made invisible.



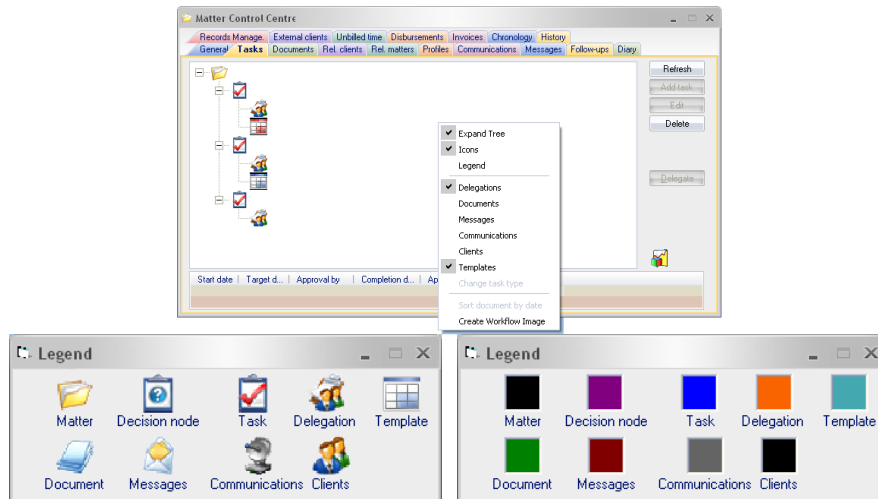
- The “Today” menu option was missing from the popup menu for diary control. This option is now added back to the popup menu.



- We have allowed default values for value and value 2 for matter progress types. We have also added an end date to the progress records. We have also allowed renaming of value, value 2, start date and end date. The progress list on the Matter Control Centre now displays the start and end dates as well.

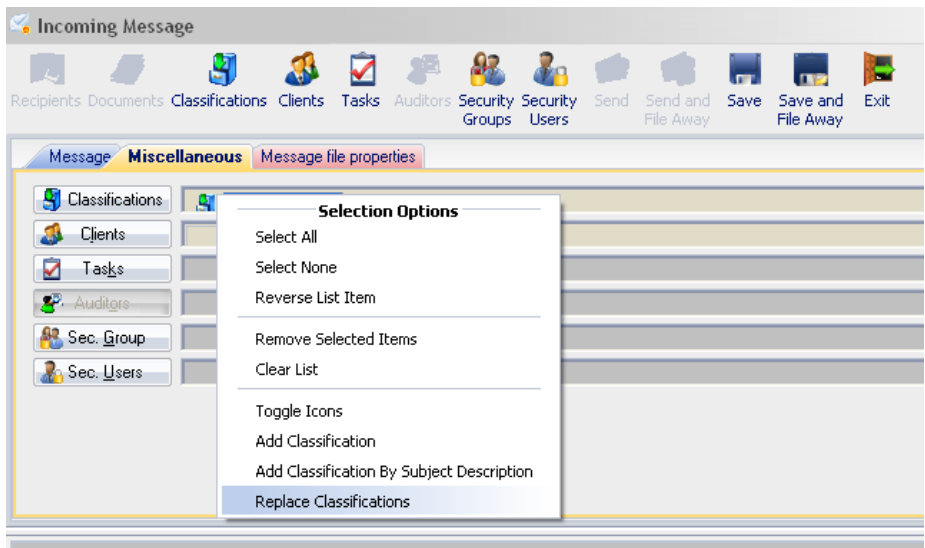


- ✚ We have changed the matter tree view in task tab of the Matter Control Centre to display the templates for each task for master matters. This can be turned on/off similar to other entities displayed on the tree view from the popup menu. The legend is also amended accordingly. We have also moved the delegation nodes to the top of the list; that is they are now displayed just after the tasks. Please note the new colour for the template on the legend. When icons are turned off, the templates will be shown on this colour.

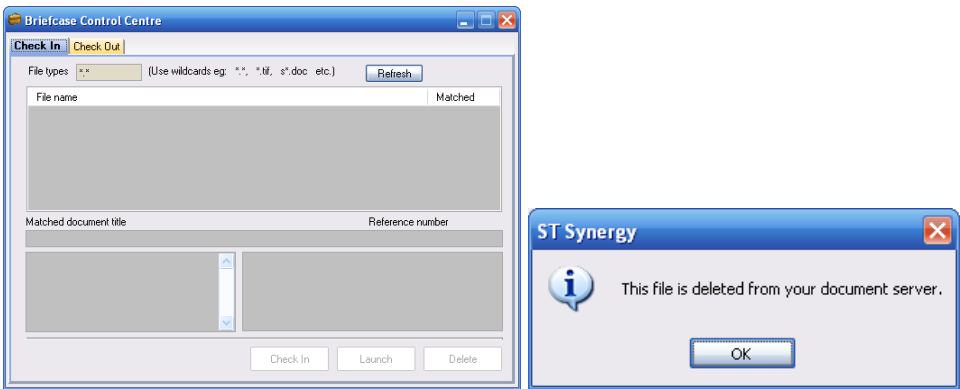


- ✚ When creating certain entities, Synergy placed a log record in the database which gets removed when the entity is successfully created. For instance, when creating a new document, a log record is placed in the database for the user creating the document and when the save button is clicked on the document properties form, the log record gets deleted from the database. However, if the user clicks the exit button, the log record is used to delete the entity that was being created (the document in the above example). Synergy also checks the log records to determine what needs to be cleaned up when a user logs into the company or logs off from the company. However, this process during the log on/off may interfere with creation of various entities in the system. Imagine a user that is in the middle of creating a document and have the document properties open. If this user starts another Synergy session, because the log record still remains in the database, new Synergy session will delete the document from the system. If this user switches back to the other existing session, and attempts to save the record, s/he will get database errors since the document has been deleted using the other session. We have added two new columns to the log table to avoid this situation, the name of the machine that entities are being created and the window handle of the MDI form that has created the record. The deletion process at the log in/out has been amended to only delete the records with matching machine name and window handle. That way, starting session on the same machine or elsewhere will not interfere with what is going on in the existing Synergy sessions.
- ✚ There was a bug in the approval of the data capture type decision nodes. If a master matter was configured to create new matters and copy clients, communications, etc. it was failing and leaving the task unapproved. This bug is fixed on this release.
- ✚ Added a replace option to the message classification popup menu in the message edit form. This option will replace the selected classification with the

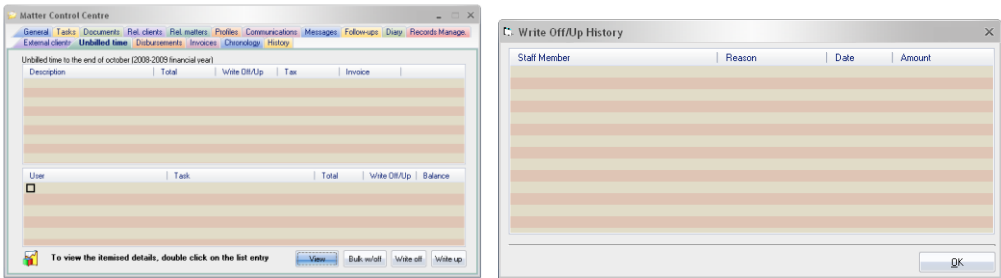
newly selected classifications. This may reduce the effort required to classify messages.



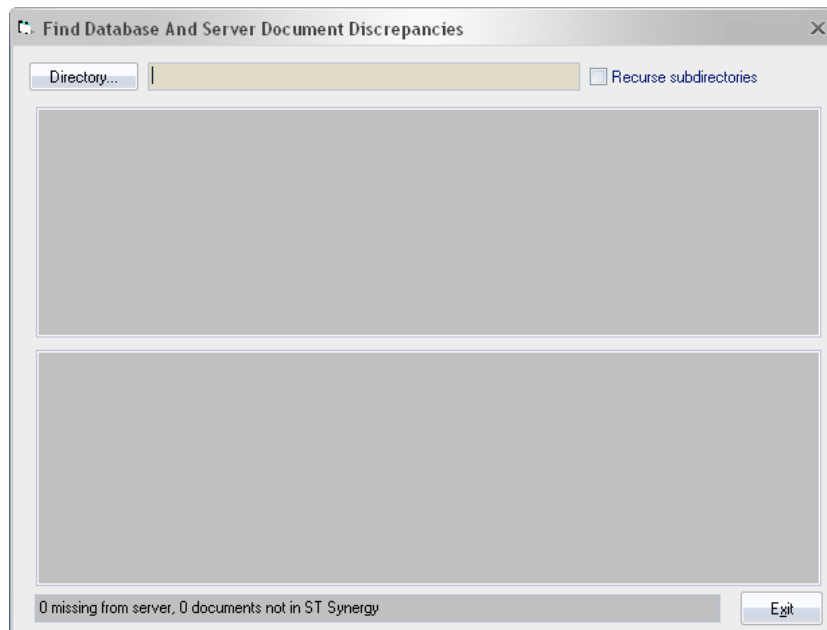
- ✚ The check in process from the Briefcase Control Centre is changed to check in the document if the document was not on the document server rather than displaying an error message. The form also leaves the file and list entry there if the check in process fails for any reason. We have also used a safer method to copy the document to the server.



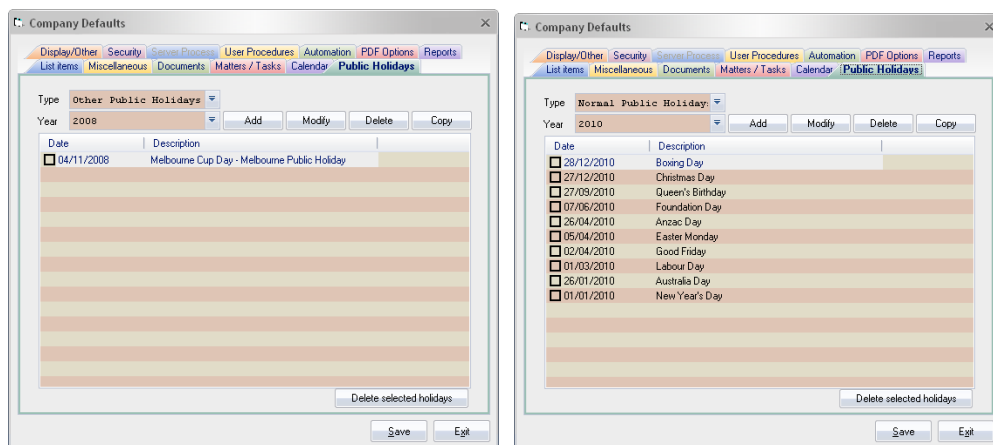
- ✚ Added ability to view the write off/up history from the unbilled time tab of the Matter Control Centre. This button will only be enabled, if write off/up has been recorded against the selected item. Please note that in some cases the button is enabled despite having \$0.00 as the total write off/up amount.



- Document audit form was displaying 1 more than the number of entries in the second list box (file system list box). This is corrected.



- All public holidays entered in Synergy was considered as public holidays for the current company. However, there could be cases where a company would want to store other types of public holidays (branch public holidays on a head office database) in the system without it affecting anything else (for example turn around times). We have added ability to add these types of



- We have added a notification process in Synergy to proactively remind users of their ACM renewal date and next upgrade date. The next upgrade date is a date determined by ST Synergy and is embedded into the application. For ACM reminders to be accurate; please call us and we will give you your exact ACM date.
- Some sites allow their users to set the creation date of matters from the matter selection form as well as delegating the first task of the newly created matter to a specific user or team. When a user or team was selected from the matter selection form, the delegation of the first task was always started from the current date. This will be incorrect if the creation date is in the future. In

these cases, the delegation date was set to current date which is before the actual creation date of the matter. Synergy has been changed to use the matter creation date when it is in the future. Current date will be used in all other cases.

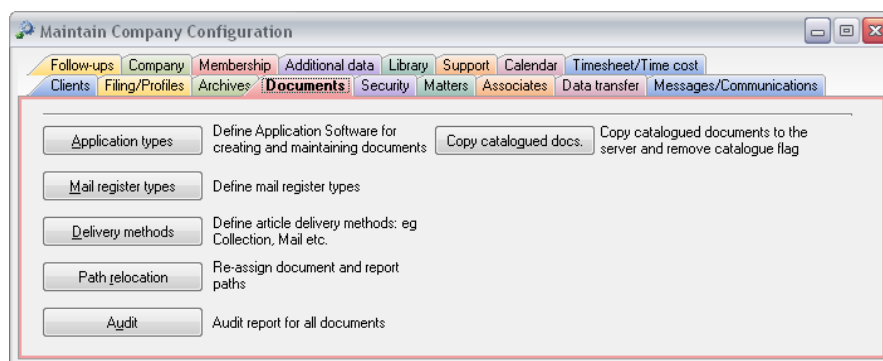
- When creating matters, Synergy will only carry the workflow decisions from a master. Using non-master matters will not allow you to carry workflow decisions from that matter even if they have some. In Client Group Enquiry, synergy was allowing users to create a matter from master and then replicate the newly created matter for other selected clients in the list if they were not using a matter template. As noted above, this will not carry the workflow to the other replicated matters. It will also not use the auto association of the matters and many other features that might be configured in the system. We have amended this process to use the master matter that was selected for the creation of subsequent matters. This amendment will allow full replication of workflow from matters. Please note that matter edit form will no longer be displayed during this process since it is considered to be a bulk matter creation process.

- On the shortcut bar, Synergy was always displaying the email count from the user's inbox. In cases where an organisation specifies a different default folder for importation in housekeeping or allows its users to import from any folder, it is pointless to display the count of emails in the default inbox. We have changed the short cut bar so that when a different importation folder is specified in the housekeeping, then count will correspond to the messages in that folder. When messages can be imported from any folder, then the icon will be hidden.

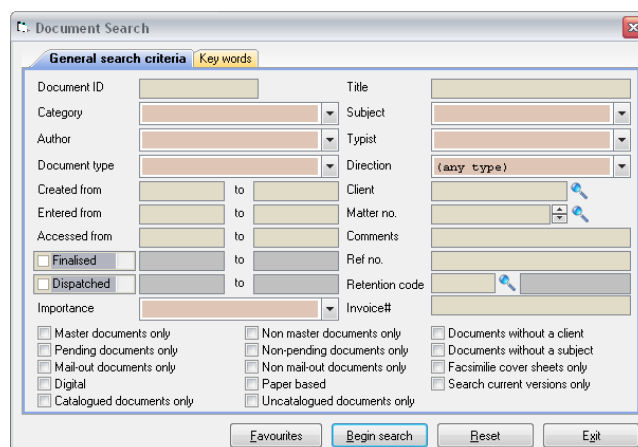


✚ Synergy allows documents to be catalogued. However, sometimes users catalogue documents by mistake. Once this is done, there is no facility through user interface to copy the source document to the server. In this version, we have introduced a button in the documents tab of the housekeeping that allows system administrators (only) in exclusive mode to copy catalogued documents to the server. When used, the system administrator is given the opportunity to select multiple documents using document search screen. System Administrator will also have to specify whether the documents have to be moved or copied from their original location. Please note that when moving documents, deletion of the documents will only occur if the database has successfully been updated and the file has successfully been copied to the server. The documents are skipped in the following situations:

- The source and destination must be different.
- Application type must have a non-blank extension.
- The extension on document and the application type must match.
- Original file must exist and be accessible to the user.
- The user must have access to the document server or if the document security is in place, the document security server must be running.
- There must be enough space on the document server for the files.
- If files are being moved, the user must have access to delete the original files after the successful copy to the server.



✚ Added ability to search for catalogued/uncatalogued documents in the document search screen.





In some cases, users create follow-up from a communication. In these instances, the actual details for follow-up could be different to the details of the client that follow-up is created for. For example, a user may speak to a representative of a bank. If the full association of the bank to its employees is not maintained within Synergy, the telephone number of the person that user has spoke to is most likely to be different to that of the bank itself. Synergy now allows storage of various contact details such as main and alternate telephone number, mobile number, VOIP account details, email address and contact name to be stored for each follow-up. Please note that only VOIP details are validate and the rest are simply stored against the follow-up. You can only enter digits on the country, area and extension fields. The phone (the third field in the contact number and alternate number from left) and the mobile number fields allow digits and spaces to be entered.

The 'Add Follow-up' dialog box has a title bar with a close button. It contains three tabs: 'Task details' (selected), 'Date details', and 'Escalation'. Under 'Task details', there are input fields for 'Matter no.', 'Description', 'Type...', and a large 'Comments' text area. Below these are contact details: 'Contact name:', 'Telephone number:', 'Alternate number:', 'Mobile number:', 'VOIP details:', and 'Email address:'. At the bottom, there is an 'Inactive' checkbox and 'Save' and 'Exit' buttons.



When a user is looking at a follow-up, s/he may have to make a telephone call before the follow-up can be actioned. In these cases, we have allowed the contact details to be stored in the follow-up itself. However, if the user would like to record the communication resulting from this follow-up, there are a few steps that the user has to take to achieve that. We have placed a button in the follow-up form that allows creation of a communication from follow-up. This button is only available when dealing with an existing follow-up. The client/task of the follow-up is passed to the communication form when this button is used.

The 'Edit Follow-up' dialog box has a title bar with a close button. It contains three tabs: 'Client details' (selected), 'Date details', and 'Escalation'. Under 'Client details', there are input fields for 'Client ID', 'Client name', 'Type...', and a large 'Comments' text area. Below these are contact details: 'Contact name:', 'Telephone number:', 'Alternate number:', 'Mobile number:', 'VOIP details:', and 'Email address:'. At the bottom, there is an 'Inactive' checkbox and 'Save' and 'Exit' buttons. A 'Communication' button is visible in the top right corner.

- ✚ We have also changed the follow-up tab of the Workcentre. We have added a new text box at the bottom right hand side of this tab for displaying the contact details if they exist.

The screenshot shows the 'Work Centre' application window. At the top, there's a 'View work centre for' dropdown. Below it is a tabbed interface with tabs for Performance, Favourites, Templates, Rec. Management, Timecost, Import Directories, Postmaster, Messages, Matters, Tasks, Documents, Follow-ups (selected), Communications, Diary, Grapevine, Server, and Timesheet. The 'Follow-ups' tab is active, showing a 'Follow-up type' dropdown, 'Due on/after' and 'and before' date pickers, and three checkboxes: 'Include inactive follow-ups', 'Display escalated follow-ups', and 'Include team follow-ups'. A large empty text box is in the center. At the bottom, there are buttons for Add, Edit, Mark actioned, Delete, and Go to client.

- ✚ This version of Synergy allows storage of default follow-up category for client and matter types. Clicking the type button on the follow-up form will default to these categories when they are set.

Two screenshots of Synergy application dialog boxes. The left screenshot is the 'Add Client Definition' dialog, with tabs for General, Security Groups, and Automatic ID. The 'General' tab is active, showing fields for Description, Default client status, Default follow-up, and Default prefix/suffix, along with checkboxes for 'Enforce entry of the business name', 'Include in telephone register', and 'Inactive'. The right screenshot is the 'Edit Matter Category' dialog, showing fields for External identifier, Description, Budgeted time, Target date days hence, and Use business days. It also has checkboxes for 'Warn users if there is no budget set', 'Target date is not mandatory', 'Add sequence number to description', and 'Set sequence number'. Below these are dropdowns for Client association category to copy, Secure addition to, Secure modification to, Secure deletion to, and Default filing category. At the bottom, there's a section for 'Profile based benchmarking details' and 'Invoice number details' with fields for Invoice number length, Prefix, Starting number, Suffix, and Sample invoice number.

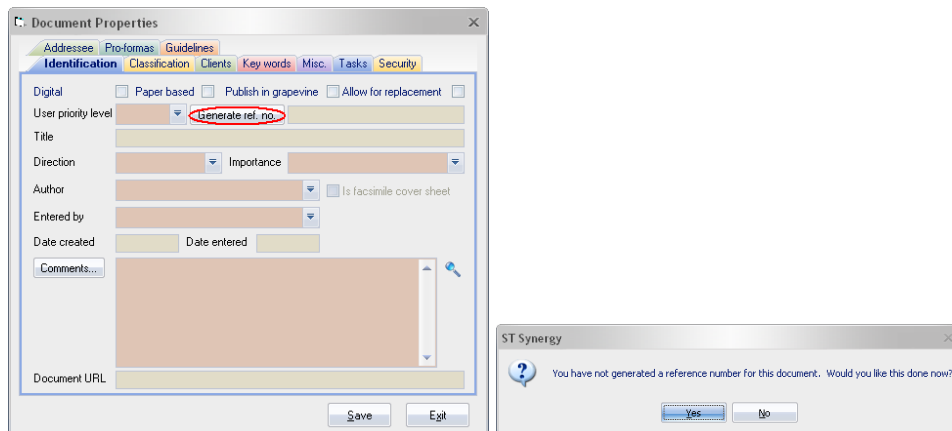
- ✚ Bulk creation of follow-ups from the Client Group Enquiry was not considering the client types. It was relying on users to have selected the client types that were allowed to have the follow-up type. This validation is added to the process. At the completion of the process, those clients that were not allowed to have the follow-up type remain selected.
- ✚ When adding follow-ups from a communication, Client Control Centre, Task from and Workcentre, the user is now prompted to select a follow-up type before the follow-up form is displayed. Given that selection of a follow-type is mandatory, this rearrangement will save an extra button click when creating follow-ups. This change will also allow the default follow-up types to be used when they are set for client and matter types. Please note that the default

follow-up may not work if it is not linked to a users' department, that is, if the default follow-up category stored for a client type or matter type is not linked to a department, the code will be unable to select the default category. In these instances, selecting all departments will use these default follow-up categories if they have been set-up.

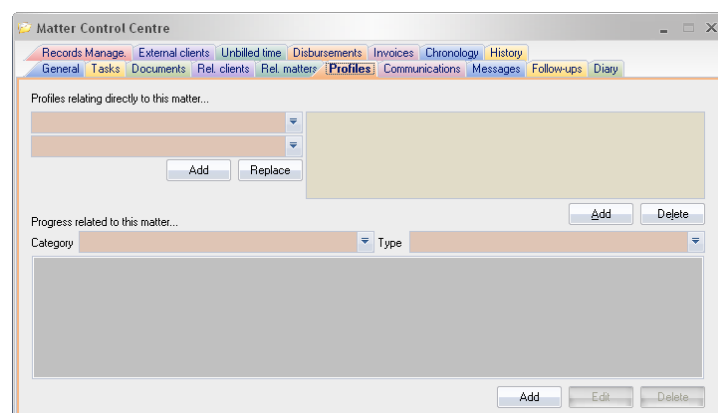
- ✚ Selection of follow-up types from the follow-up form was displaying the inactive follow-ups. We have removed the inactive follow-up categories and types from the follow-up list.
- ✚ Site using the automation/security server to create new directories on the server can now set the limit based on the size of the directory rather than the number of files in the directory. This would be useful for sites that would like to use DVDs for archiving the document. In those cases, System Administrator can set the limit to a size slightly less than the size of the DVD. Bulk importation of documents has been amended to consider the new option. However, the stated size could exceed during single importation/creation of a document if longer refresh interval are used.

- ✚ Master documents can be configured to have a numeric reference numbers. Once configured, any document based on these masters will have a button on the identification tab that allows them to allocate the next reference number to the document being created. Given that this process are not automated and the user has to push the “**Generate ref no.**” button, there are times that users

forget to do this and save their documents without assigning the reference numbers. To avoid this, we have placed a warning message as displayed below. This warning will only be displayed if the “**Generate ref no.**” button is still visible and the reference number field is left blank.

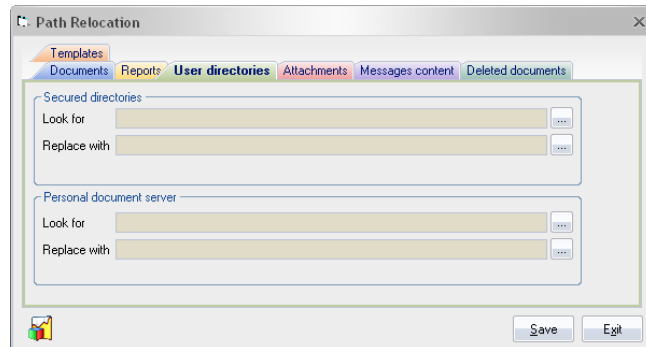


- ✚ Fixed a bug in deleting entries from the client type and matter type list of a follow-up. When deleting an entry, if there was any client or matter follow-up of that type, it was not deleting the entry. Synergy now considers the client type and matter type in validating the deletion process.
- ✚ Profile tab of the Matter Control Centre allows users to add profiles in groups. In some cases, users may want to add just a single profile to a matter. Additionally, in those cases, the profile category might already be selected in the Matter Control Centre's profile tab. However, the user still needs to go through the process of adding multiple profiles even though everything is set in the profile tab. In this version, we have added a profile type drop down to the profile tab of the Matter Control Centre. When user selects a profile category, the profile type dropdown is filled. We have also added two buttons for adding and replacing the profile to/from the list. Please note that replacing a profile is a two step process, that is, Synergy will delete the selected profile from the list first before adding the profile type from the new dropdown. Also note that this change will only allow addition or replacement of profiles from the same category. The existing add and delete button will behave as before.

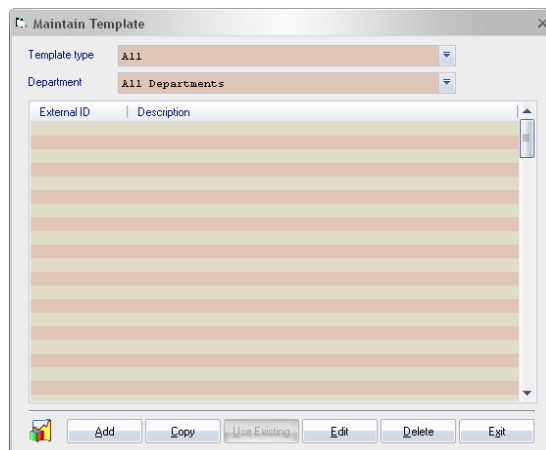


- ✚ When you select an entry in the timesheet list in the timesheet tab of the Workcentre, the entry will be selected on the shortcut bar.

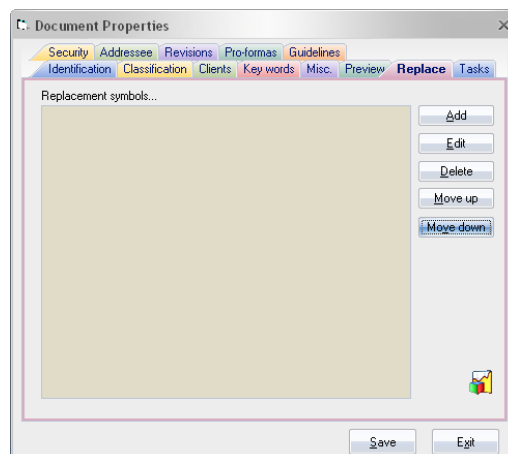
- Users' personal folders were not changing when relocating document servers. This bug is fixed now.



- When maintaining the templates, you can now run a report that displays the selected templates and their description and the comments field of the template. This report could be run from the template tab of the Workcentre for a single template type as well. The report has been changed to include the new comments field. Please copy the report to your system directory.

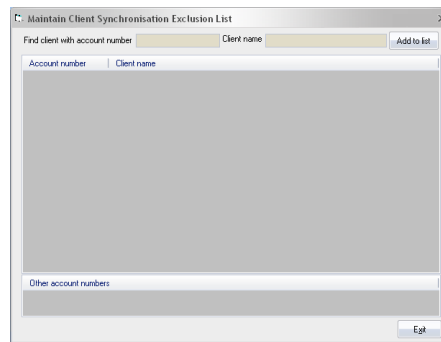


- Added a crystal report to the replacement symbol tab of the document properties form. This report will allow users to see information on all of the replacement symbols from the selected document.





Added ability to manually add client account numbers into client synchronisation exclusion list. Please note that adding account numbers manually will be treated as creating a client and then deleting it right away, that is, each addition will consume a primary key from the ZZCLIENT table. We strongly advise you to use the manual addition of account number only in rare cases where the old clients have been deleted from the system before the exclusion feature was turned on. You should not manipulate this list at all once the exclusion feature is turned on.



*Modification as at release 08.00.03*

- Fixed an error in the upgrade process. If we dropped a column from a table that contained a check sum, the check sums were not being recalculated.
- Added an option to the user setting which enables each user to specify whether s/he would like to open multiple control centres. The previous versions had just one setting for all users at the housekeeping. Also removed the outdated **“Notification message on top”** setting from this form as it is no longer used in Synergy.

The screenshot shows the 'Add User' dialog box with the 'User details' tab selected. The dialog has a title bar 'Add User' and a close button. Below the title bar are several tabs: 'Toolbars', 'Approval', 'User details' (selected), 'Teams/Clerks', 'Security groups', 'Grapevine', 'Rates', 'Recovery rates', and 'Performance'. The 'User details' tab contains the following fields and controls:

- User ID: Text input field
- Logon ID: Text input field
- Name: Text input field with a search icon
- User type: Dropdown menu (currently set to 'Staff')
- Enter new password: Text input field
- Confirm password: Text input field
- Check messages every: Text input field (set to 'minutes')
- Start with Work Centre: Dropdown menu (set to 'Start with Work Centre')
- Access group: Dropdown menu (set to 'Container')
- Title / position: Text input field
- Title / position (line 2): Text input field
- Email address: Text input field
- Telephone: Text input field
- Default to: Dropdown menu (set to 'Accounting Host')
- Scanning app...: Text input field
- Scan directory...: Text input field
- Document server...: Text input field
- Briefcase...: Text input field
- Secure directory...: Text input field
- Buttons: 'Clear' (next to Document server...), 'Clear' (next to Briefcase...), 'Clear' (next to Secure directory...)
- Buttons: 'Bulk approve', 'E-Mail Administrator', 'Post master', 'Allow multiple control centres', 'Time tracking'
- Buttons: 'Skin file' (set to 'Not used'), 'Tab style' (set to 'Property page 2003'), 'Office 2007 Aqua'
- Buttons: 'Save', 'Exit'
- Checkbox: 'Link to a Records Management location'

- Moved the timesheet approvers from the fees/rates tab of the user form into a new tab called “Approval”. Renamed the “Fees/Rates” tab to “Rates” in the edit user form.

The screenshot shows the 'Add User' dialog box with the 'Rates' tab selected. The dialog has the same title bar and tabs as the previous screenshot. The 'Rates' tab contains the following fields and controls:

- Weekly hours: Text input field (set to '0')
- Annual salary: Text input field (set to '\$0.00')
- Unit in minutes: Text input field (set to '0')
- Hourly rate: Text input field (set to '\$0.00')
- Hourly cost: Text input field (set to '\$0.00')
- Display from: Text input field (set to '\$0.00')
- Max per entry: Text input field (set to '\$0.00')
- Cumulative limit: Text input field (set to '\$0.00')
- Buttons: 'Add', 'Edit', 'Delete'
- Buttons: 'Save', 'Exit'
- Checkbox: 'Link to a Records Management location'

- Added client identifier and matter types for creating user rates. Sites can now have a user specific rate for any combination of client, matter type and task



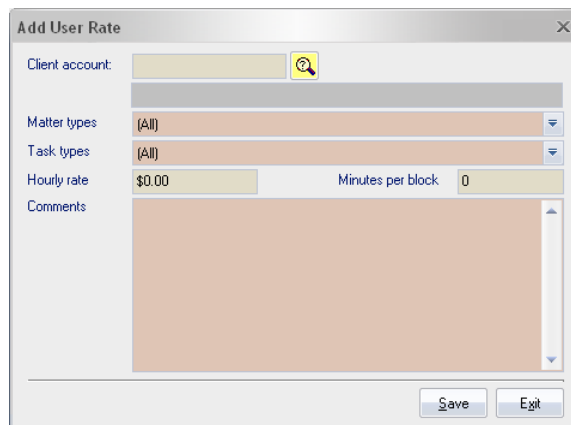
type. Obviously, you cannot have duplicate combination. The rates are used in the following order of existence when the time cost entry is linked to a task:

- 1) Client and task type rate is used if the combination exists.
- 2) Default task type rate is used if it exists.
- 3) Client and matter type rate is used if the combination exists.
- 4) Default matter type rate is used if it exists.
- 5) Default client rate is used if it exists.
- 6) Default user rate is used.

The rates are used in the following order of existence when the time cost entry is linked to a client only:

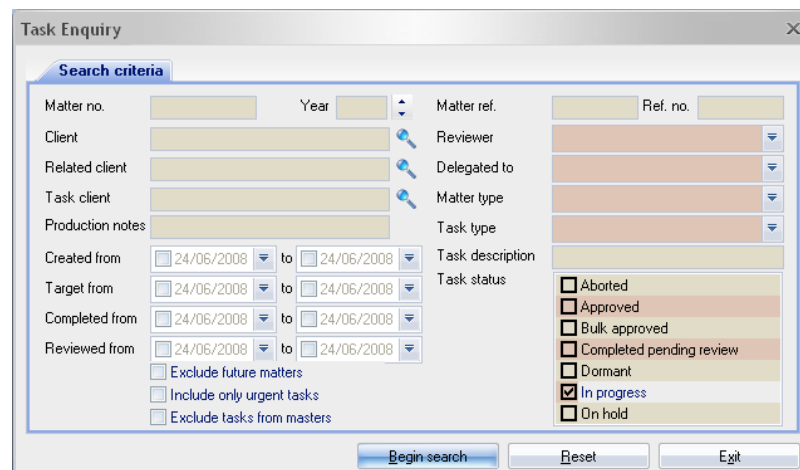
- 1) Default client rate is used if it exists.
- 2) Default user rate is used.

In all other cases, the default rate for the user will be used.

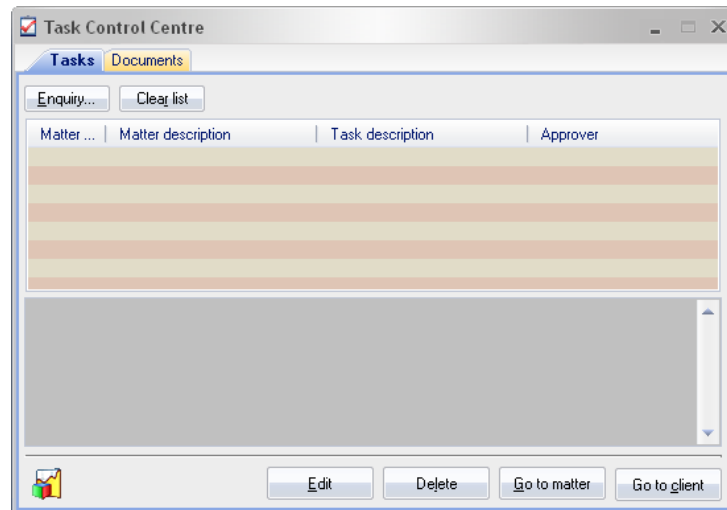


Task search from has changed as follows:

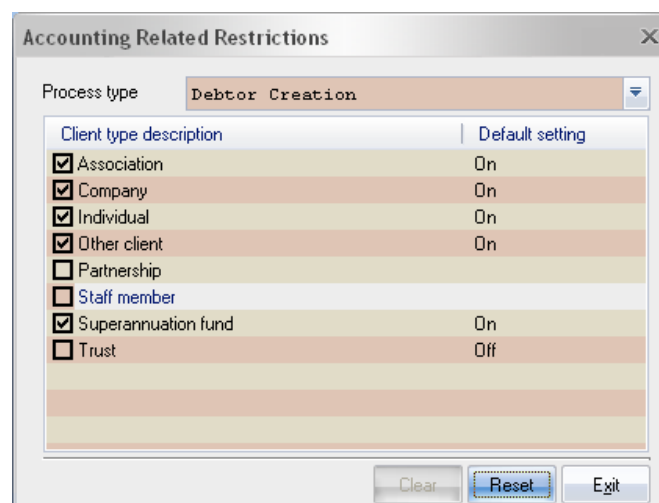
- Allowed the tasks of master matters to be filtered out in the task enquiry form.
- Replaced date entry fields with date pickers.
- Added ability to search by task description and production notes.



- ✚ The communications lists are now displayed in the descending date, start and end time order.
- ✚ Allowed drag and drop to the task tab of the matter control centre. Please note that the drag and drop will only work if you drop the items on a task node and the task is either active or on hold. As you drag items over the tree view, Synergy will highlight the node if you can drop the items on that node.
- ✚ Changed the list box on task control centre to a sortable list view.

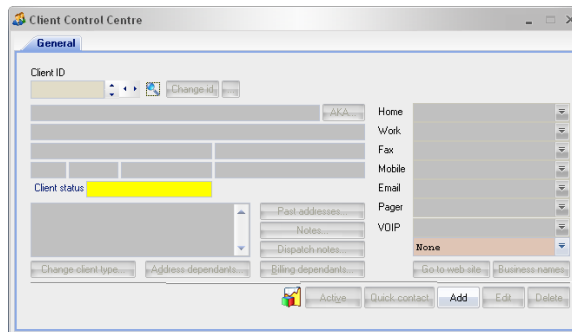


- ✚ Changed the accounting restriction form to be user friendlier. In previous versions, the user had to add or delete the entries from the list view. In this version, to set the default to on you need to check the entry that you want in the list box. To set the default to off, you need to uncheck the entry that you want. To allow Synergy to use its default behaviour for an entry, select the entry and click the clear button. Pressing reset button will perform a clear operation for all of the entries in the list box. Please note that the clear button will only be enabled if the selected entry has a default setting. The reset button will only be enabled if any of the list entries have a default setting.

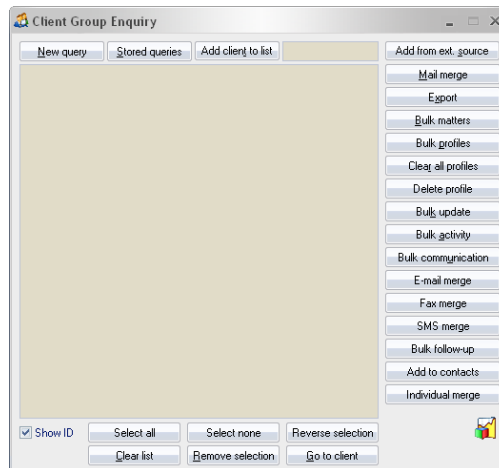


- ✚ Bulk deletion of the related clients from the Matter Control Centre was not deleting all of the selected clients. This is fixed now.

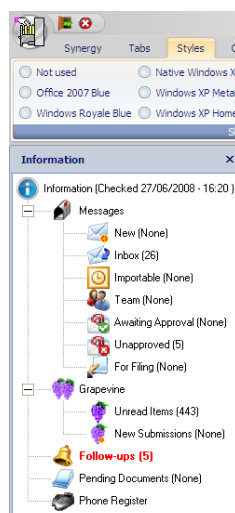
- Application was crashing when user clicked a right mouse button on the staff, matter or client tab of the Calendar control centre. This is fixed now.
- Added the pager number to the Client Control Centre.



- Export button on the client group enquiry was always creating a transfer.xxx file. Changed the export process to allow the ability to create a new file or overwrite and existing file. Please note that when you select an existing file, you would have to confirm before the file is overwritten.



- The follow-ups entry in the Synergy information bar is made red and bold if there are any follow-ups for the logged user. This is done so that the users are alerted to the fact that they need to inspect their follow-ups.



- Added the client image to the communication form as well as a create button. The create button will allow users to create a new client and then link the communication to the newly created client. Please note that the create button will only be available when adding new communications.

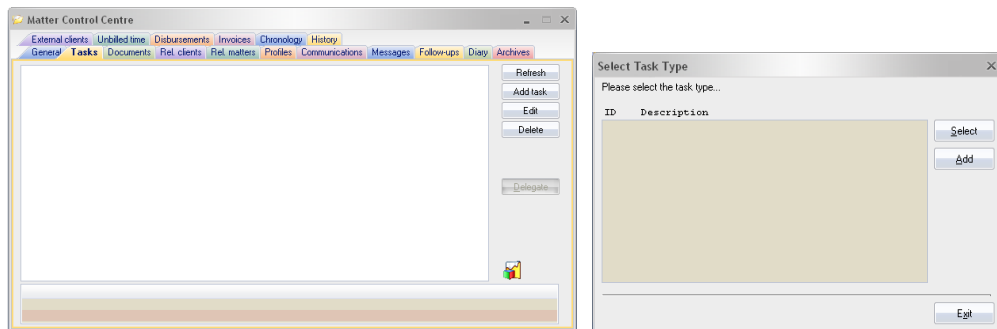
- Allowed advanced import form to be launched from the bulk import button of the document tab in the task form. This button will launch this advanced form if the user is part of the security group for advance document import. If the user is not part of the group, the previous importation form will be displayed.

Normal Import

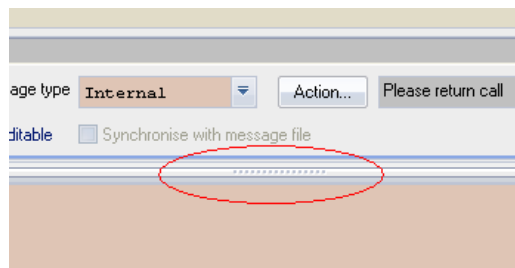
Advanced Import

- Added ability to add task types when adding tasks to a master matter. This would be useful during configuration of master matters and when the required task type is yet to be created. In previous versions, a house keeper had to load the housekeeping, click on the matters tab, click on matter types, select the required matter type, click task types and then click the add button. This feature will quickly achieve the same process without having to do all of the

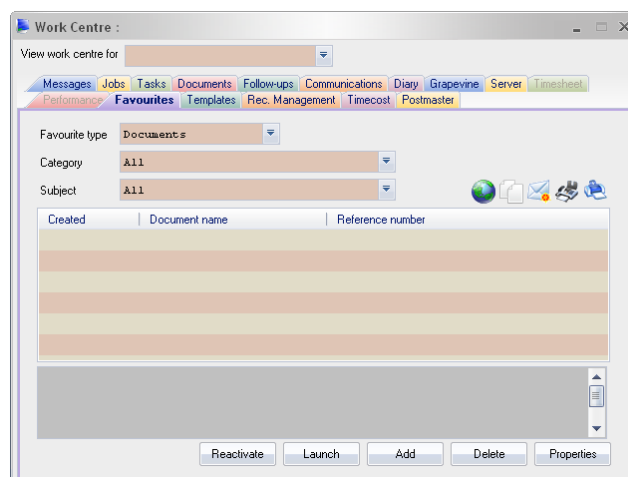
above mentions process. In the following image, the “Add” button was not present in the previous versions.



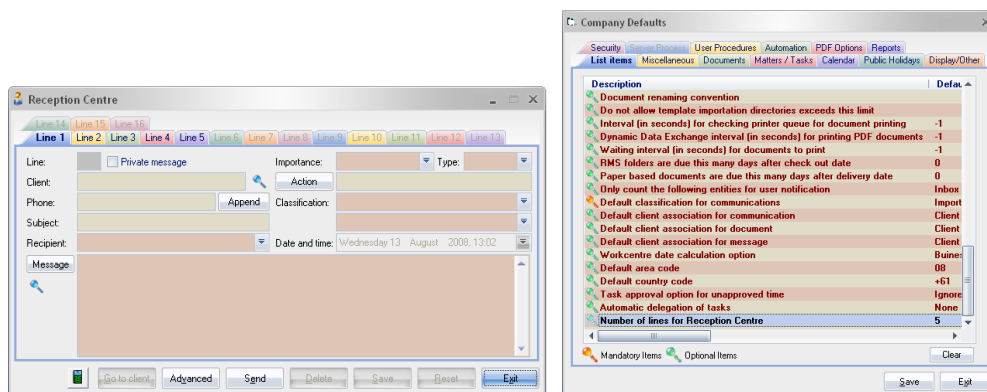
- ✚ We have replaced the splitter control with a new one more consistent with the current look and feel of the application. The splitter is used in the message import form and the message creation form.



- ✚ Added document related buttons (email, fax, copy and print) to the favourites tab of the work centre. These buttons will only be visible for favourite documents.



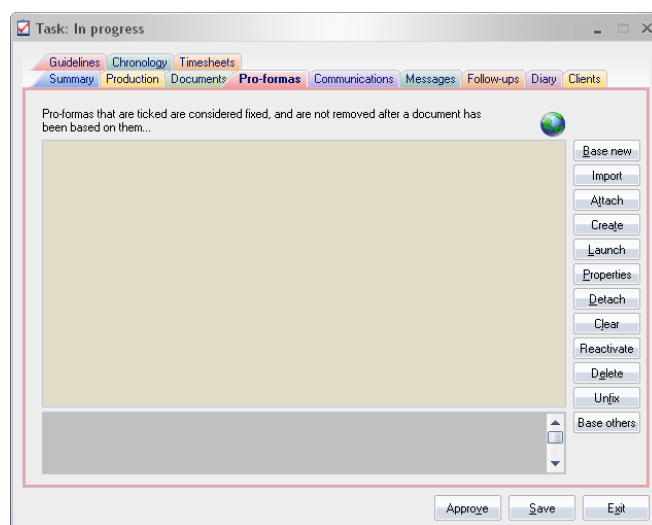
- ✚ In sites using the time cost system, when messages are composed, a time sheet entry is added to the system for the person that is composing the message. However, if the user abandons the message and exits out of the form, the message was still left in the system because Synergy did not allow deletion of any entity if there was a time sheet entry against it. We have altered Synergy to allow deletion of entities if the time sheet entries are unapproved. Please note that all unapproved time sheet entries will be deleted along with the entity being deleted.
- ✚ Fixed a run time error on the communication tab of the task edit form. The run time error was occurring when a user attempted to detach the only entry in the list.
- ✚ Fixed a display problem with creating clients from template. If you try to create associations using this method, the association form was not displaying the details if there was only a single association. Also, if you had configured the client template to create more than one association, the image on the search button was displaying a black background. All of these are corrected on this release.
- ✚ The appointment notification form was not displaying. This was due to a change in the modality of the form itself. This is fixed now.
- ✚ Added a new menu option for attachments in the message form. Now users can bulk import message attachments rather than one by one. User can specify whether they want the documents to be finalised or not after the importation. They can also select a document template to be applied to each document during importation. Please note that the document properties form will be displayed for each imported document. If you click the exit button on the document properties form, the importation will be aborted. Please also note that if there is more than one application type for a document extension, then you will be prompted to select the proper application type for the document being imported (word documents could be an example of such documents because there is likely to be two application types, one defined for mail merging and the other for normal non-mergable word documents).
- ✚ Developed a new reception centre. The new reception centre is a simplified version of the message form. It is easier to select users and filing classification than it was in the old reception centre. Sites can use the new reception centre by specifying the number of telephone lines at the company defaults. A value of zero will revert back to displaying the old reception centre.



- Added a button “Other” to the pro-forma tab of the task form that allows users to pick any existing pro-forma form other tasks in a matter. This button behaves like base new button with the following differences:

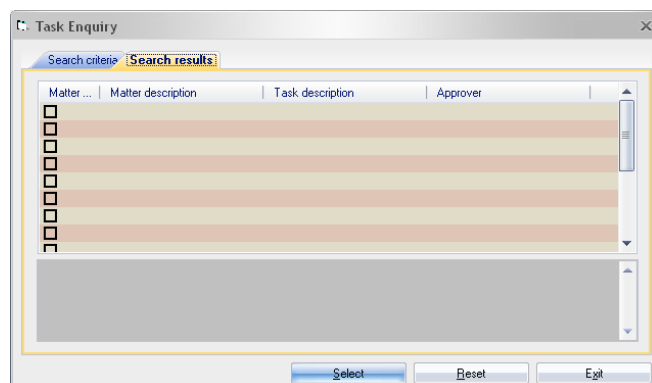
- The created document is attached to the current task rather than the task the pro-forma is selected from.
- The pro-forma document at the source task will not be altered at all, that is the pro-forma record will not be deleted if it is unfixed.
- 

This would be handy in cases where a user has forgotten to create the document and has approved the task and another user has realised this and needs to correct the mistake. Without this button, the user has to know which task the pro-forma is on, unapproved it, create the document and approve the task. This is a handy short-cut for all of that.

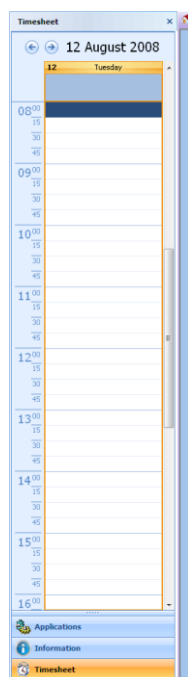


- When approving time sheet entries, if a use decides to cost the entry to other billing periods rather than the current one, the form default to the first active billing period. This has been creating problems because users will then have pick the right billing period for the entry that is being approved. We have changed Synergy application to determine the relevant billing period from the date of the time entry that is being approved. This way, the correct billing period is displayed and selected. Please remember that if the required billing period is inactive, then current billing period will be displayed.

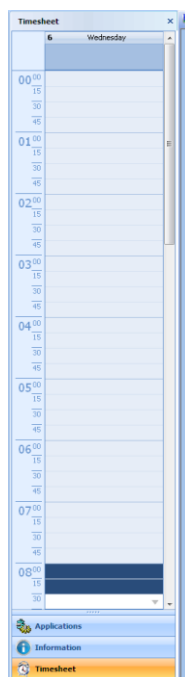
- Added ability to multi-select tasks when attaching them to a communication.



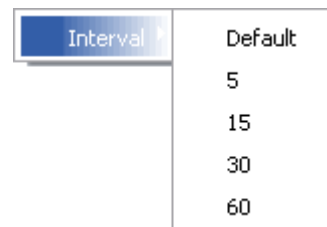
- Added timesheet to the shortcut bar. Timesheet bar will only be visible for those sites using time costing. Please note that timesheet bar will be synchronised with the selected date on the timesheet tab of the WC if you have the WC open and timesheet tab is the selected tab on that form. When the timesheet bar is being synchronised with the WC, the date scrolling buttons will not be visible since it is meant to display the timesheet entries of the selected date from the timesheet tab. If you change the selected tab in the WC, or close WC, the timesheet bar will default to current date and the scrollbars will be displayed so that you can view other dates. The time interval will be defaulted to 15 minute interval. However, you can change this by using the popup menu that gets displayed by clicking the right mouse button on the timesheet bar. The default entry will use the minutes per block set for the currently logged user. These options are all in minutes.



Default

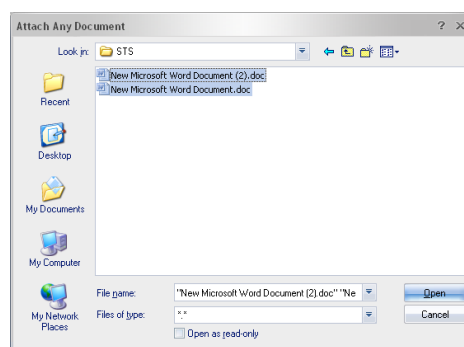
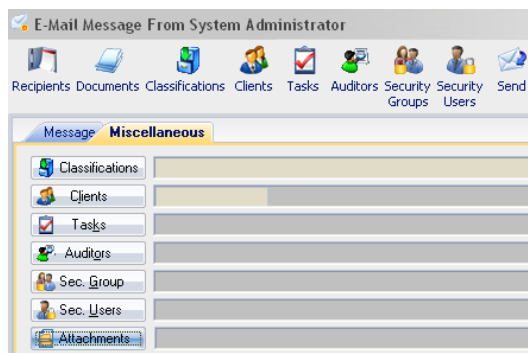


With WC open



Popup menu

- Attaching external files to a message is done one at a time even if all of the required files were on the same directory in the file system. We have changed it in this version so that a user can select multiple files from the same directory when attaching external files to a message.

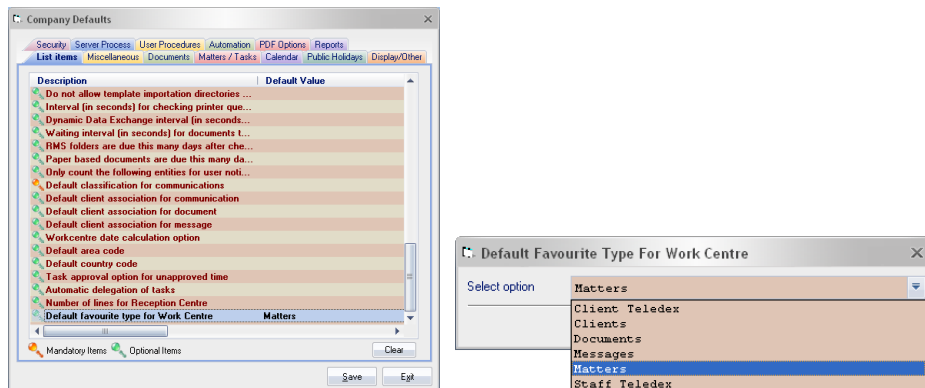




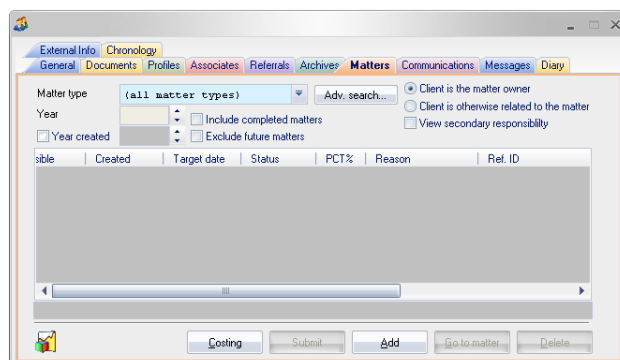
- When sites are using the Synergy fax server to import received faxes automatically, sometime it would be handy to search these incoming faxes only. This would be handy when, for example, the user is trying to delete the junk faxes that are imported into Synergy. In previous versions, there was no facility to search (from WC) only for faxes. We have added a new drop down that will allow user to search Emails, Faxes, SMS messages or all. The default is set to search for everything.

- We use the WinGraphViz.DLL to create the workflow image. This DLL is using whatever the current working directory is for creating temporary files and directories. From this version onwards, we have added a setting at the housekeeping that allows users to force synergy to change the current directory to its system directory “SysDir” before work flow images are created. Since all synergy users will have access to this share, the DLL will hopefully create its temporary files on this folder. This setting should only be used if the users do not have access to their local drives.
- WinGraphViz.DLL may not show labels when images are created on terminal server or Citrix. This is because when a user logs on to terminal server, the operating system may return a different location for the windows system directory when application query this setting. One way to cure this is to set the home folder to “Local path” in the active directory and default it to “C:\”.

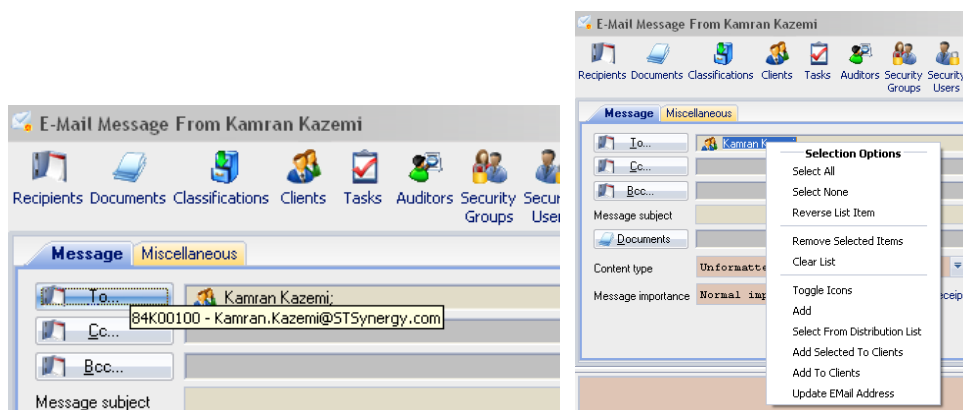
- We have added a new setting to the company defaults that allows sites to specify the default favourite type for their Work Centre. In this version, this setting is a company wide setting. However, in the future versions, we will include a user level setting for this option.



- Added matter reference number to the matter list of the Client Control Centre. Also added a field that allows users to filter the matters by its creation year.



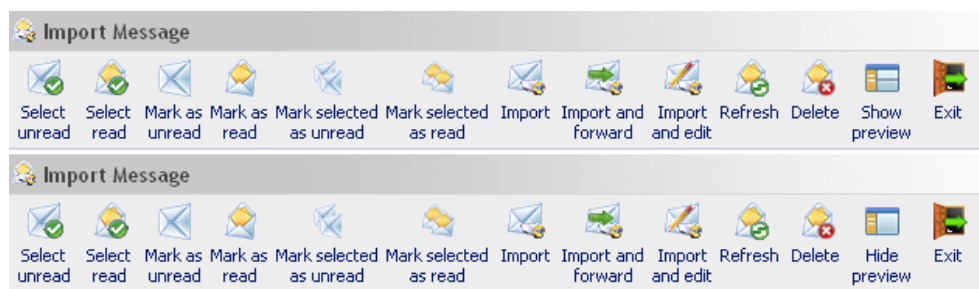
- The message form now displays the client and external client's email address on the mouse hover text. We have also added the ability to update the client and external client email address if the user wants to change it from the message form. Please note that you need to have an entry highlighted and must have access to update the client details in order to change the Email address. The update can be done using the popup menu option.



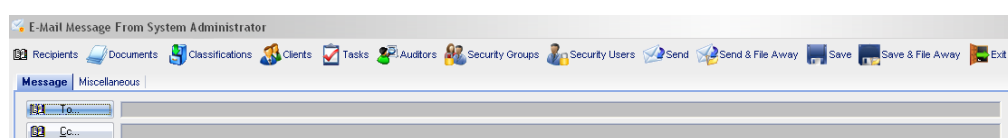
- ✚ When document version control was turned on for a document, the first level version numbers were skipping, that is you might have created a V1.0 document but if you tried creating another document from this document, the revision number might have been set to V5.0 or V10.0 which is incorrect. This is fixed now.
- ✚ When sending facsimile or SMS, if the numbers contain “+” at the beginning, MS Outlook may not accept it as a valid number. Changed Synergy to strip the “+” sign from mobile and facsimile numbers before sending them via MS Outlook.

### *Modification as at release 08.00.02b*

- ✚ Fixed an error that was occurring on profiling of matters when tasks were being approved.
- ✚ When importing message to workcentre using the new drag and drop method, Synergy was not checking to see if importation is allowed. This is now in place and the drag and drop will only work if the user is allowed to import messages in the workcentre.
- ✚ Using the new drag and drop method for importing emails has demonstrated to be a much more user friendly approach for email importation. However, if a user imports emails using this method, the emails may be mixed with other existing emails and might be difficult to locate for editing and filing. We have introduced a new option to the messages section of the company default in the miscellaneous tab that allows sites to enable users to edit the messages as they are being imported using this method. When this option is turned on, the user will be asked if s/would like to edit each message as it is being imported.
- ✚ The message importation form has gone through a face lift. The icons have modernised. The following changes has been done:
  - Icons have been changed.

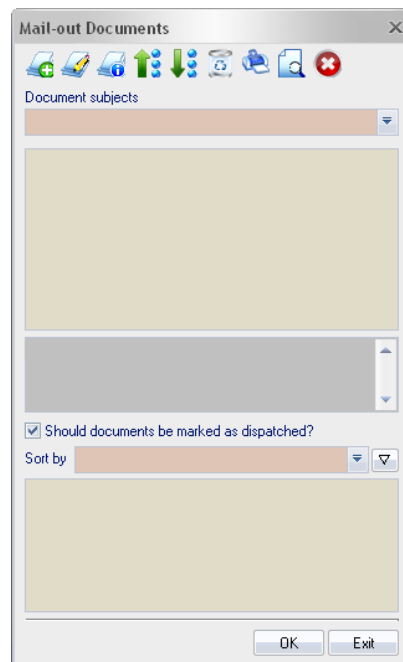


- We have changed the popup menu just to include the selection option. All other options can be accessed from the toolbar. You will notice the “**Select unread**” and “**Select read**” toolbar items. These options were only available from the popup menu of the message list.
  - We have also added an “Import and edit” option to the toolbar. This will allow users to edit messages as they are imported.
  - This form is now resizable. Please note that the form will not allow you to make the width or height to become less than its initial size. However, you can increase the size as you wish.
  - You can also show/hide the preview pane using the toolbar items.
- ✚ When loading a control centre, Synergy was not setting the focus to the newly loaded control centre. This is fixed now.
  - ✚ Added two new toolbar items to the message form that allows users to send and file away new messages or save and file away imported messages in one step. These tool bar items will be made visible as appropriate.

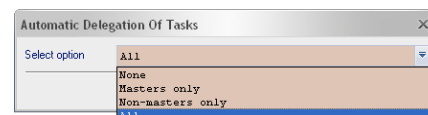
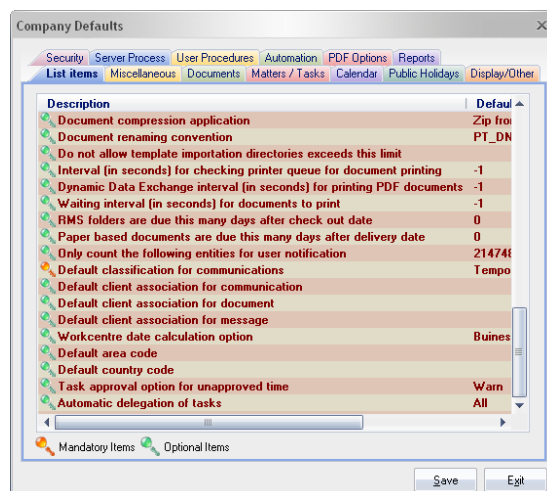


### *Modification as at release 08.00.02a*

- There was a bug in the mail merge form. When users edit a document that contain document related merge fields, word was not finding the required merge fields because the merge table was not being rebuilt to contain the document related information. Added the code to rebuild the merge table before launching the word document. We have also changed the icons on the toolbar.



- Most often when creating new tasks on a master matter, the user may want to delegate the task to the approver of the task as well. In previous versions of Synergy, this could have been achieved by selecting the task after creation on the Matter Control Centre and then clicking the delegate button. Then you had to select a user and fill out the notes if there were any. In this version, we have added a new setting to the housekeeping that allows sites to specify whether they want this delegation to be done automatically. There are 4 options as to what types of matter should use this setting as displayed below.





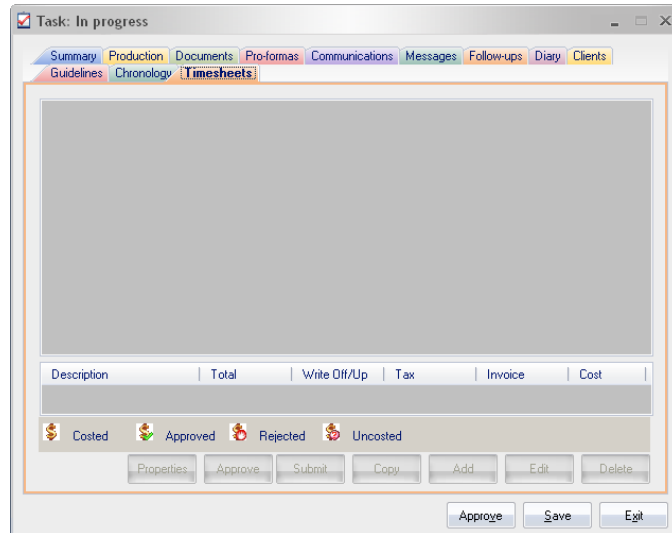
When adding/editing communication and using the associate button to specify who was the person that you spoke to, Synergy was not adding the associate to the client list. We have added a new button “Assoc. & Client” to the communication form that allows users to select the associate and add it to the client list with one button click. In this form, when the primary client was removed, the client name field was resetting to blanks but the phone numbers field was still displaying the information. This field is now cleared when primary client account number was cleared in the form.



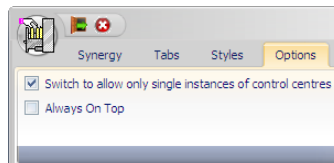
Corrected a Syntax error in the process that allows modification of user related information. It was related to moving follow-ups from one person to another. This is fixed now

Option	Description	Filter
Secured Clients		All
Secured Documents		All
Secured Communications		All
Secured Appointments		All
Secured Messages		All
Secured Templates		All
Security Groups		n/a
Other Users Stored Within Templates		n/a
Postmaster Documents		All
Imported Documents		All
Author Of Documents		All
Typist Of Documents		All
Follow-ups		All
Escalated Follow-ups		All
Person Responsible For Clients		All
Auditors Of Messages		All
Records Management System		All

- Allowed the time cost tab of the task form to be refreshed when the time cost tab is clicked. This will allow users to add communication, diary and other entities from within a task, then click on the time cost tab and approve them while they are inside the task.



- Added a new option to the options menu that allows users to force the Synergy desktop to be displayed on top of other desktop windows. Please note that if you have other applications that have a similar feature, then all top windows are displayed based on the Z-order.



### *Modification as at release 08.00.02*

- ✚ Synergy allows matters and clients to be profiled when a workflow decision is made. However, there was no facility to remove profiles as part of the workflow. In this version, we have provided ability to remove profiles as part of the workflow process. Please note that identical rule is applied for deleting profiles, that is, when setting a profile as a matter related profile, the deletion of profile will only consider the matter profiles. Similarly for the client related profiles.

Edit Existing	Matter type	Additional data	Client related

- ✚ Added Aqua, Silver and Black skins for the Synergy ribbon bar. This can be set like the tab appearance, at the company or user level.

**Client**

- ☒ Allow automatic generation of client ids
- ☒ Allow non-unique business names (Not Recommended)
- ☒ Delete Client Group Enquiry table on logoff
- ☒ Enforce the activity change when client type changes
- ☐ Exclude client from synchronisation when deleted
- ☐ Full names contain middle name
- ☒ Host company to be registered office
- ☐ Synchronise client's phone number in tax product
- ☒ Use 'Client is otherwise related to the matter' option in Client Control Ce
- ☒ View relationships based on associate's perspective
- ☒ When checking clients for duplicates, check for similar business names

**Document**

- ☐ Allow meta-data processing when importing documents

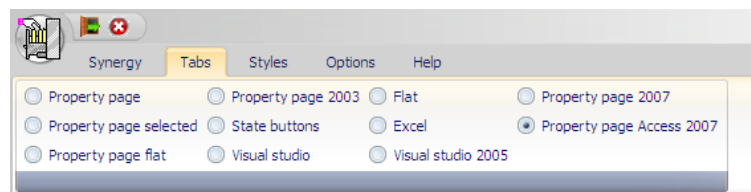
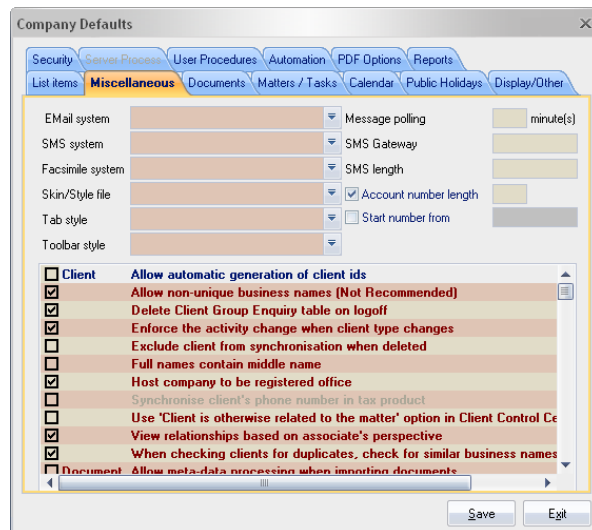
**Skin Options**

- ☐ Not used
- ☐ Native Windows XP
- ☐ Custom
- ☐ Windows Vista Silver
- ☒ Office 2007 Blue
- ☐ Windows XP Metallic
- ☐ Windows Vista Blue
- ☐ Office 2007 Aqua
- ☐ Windows Royale Blue
- ☐ Windows XP Homestead
- ☐ Windows Vista Black
- ☐ Office 2007 Silver
- ☐ Office 2007 Blue
- ☐ Office 2007 Black

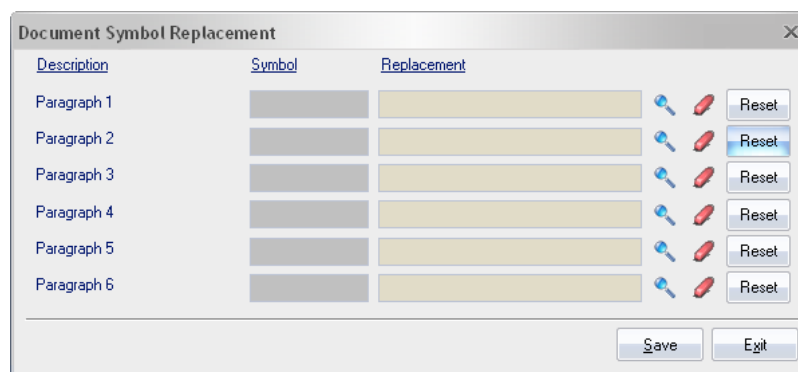
**Toolbar Styles**



- Added ability to specify a list of values for document replacement symbols both at the document and template levels.
- When importing documents and templates from another database, Synergy will now import the replacement symbols and their corresponding list if exists. Please note that only symbols that are not linked to additional data or database fields are imported.
- Added an Access 2007 style tabs to the tab styles.



- We have changed the replacement process for word documents. In previous version, Synergy was replacing the normal (non-document based) symbols first and then replacing the document based symbols next. The order is swapped now. This way, the documents are inserted into the main document first and then any other symbols are replaced regardless of whether they were in the main document or came from the inserted documents.
- Added reset and clear button to the replacement symbol form. These buttons are only available for the document based symbols.





Added a copy button to the template form that allows users to copy existing template.

The 'Maintain Template' dialog box features a title bar with a close button. It contains two dropdown menus for 'Template type' and 'Department'. Below these is a table with two columns: 'External ID' and 'Description'. The table has 10 rows with alternating light orange and light yellow background colors. At the bottom of the dialog are six buttons: 'Add', 'Copy', 'Use Existing', 'Edit', 'Delete', and 'Exit'.

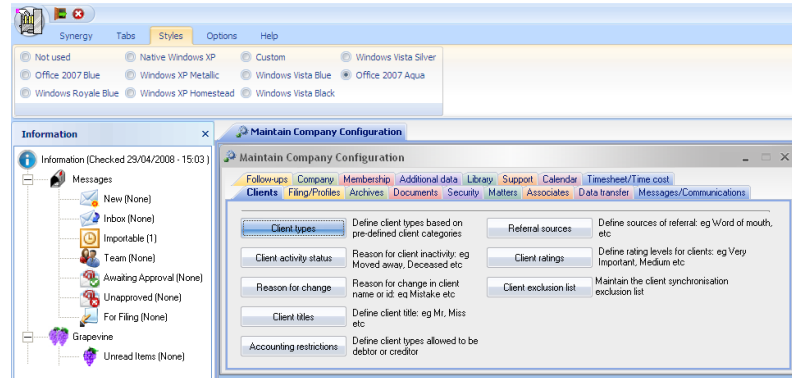


Changed the related clients list to a multi select list and changed the deletion process to delete all selected items. If there are no items checked, then the highlighted item will be deleted. Also added a popup menu (without remove and clear items) to select/deselect the items in the related clients list.

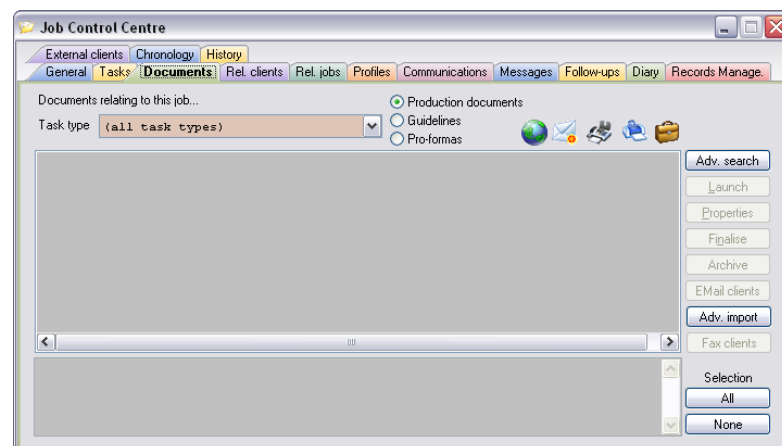
The 'Matter Control Centre' window has a menu bar with options: External clients, Unbilled time, Disbursements, Invoices, Chronology, History, General, Tasks, Documents, Rel. clients, Rel. matters, Profiles, Communications, Messages, Followups, Diary, and Archives. The 'Rel. clients' menu item is highlighted. The main area is titled 'Other clients associated with the primary client of this matter...' and contains a table with columns 'Client ID', 'Client name', and 'Relationship/Association'. The table has two empty rows. To the right of the table are five buttons: 'Add', 'Assign', 'Delete', 'Go to client', and 'Rel. Assoc.'.

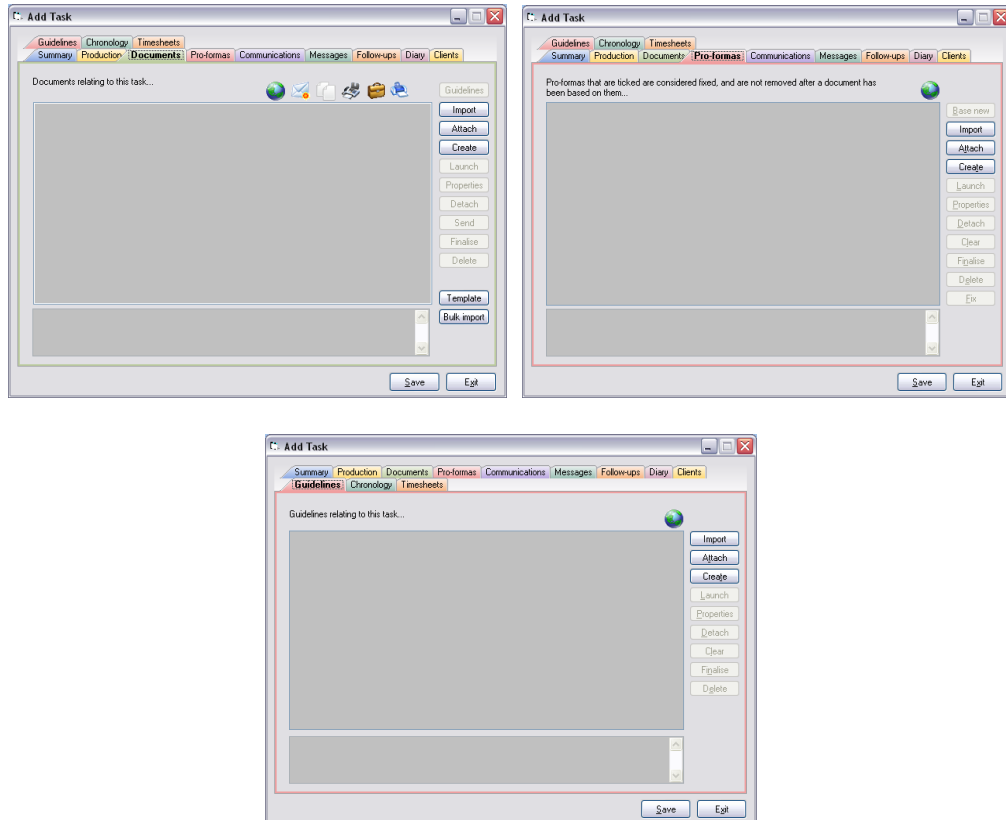
### *Modification as at release 08.00.01*

- ✚ Added ability to drag and drop outlook contacts into Synergy. This will start the process of creating a client which will only work when the selected contact is dropped onto the CCC, Synergy desktop or shortcut bar.
- ✚ Added an office 2007 Aqua style to the toolbar.

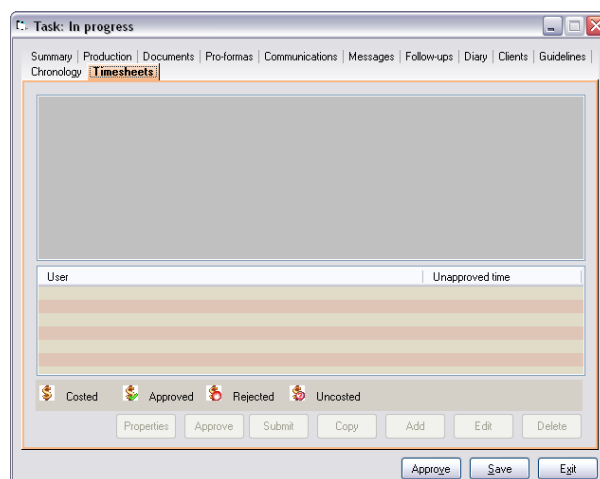


- ✚ Added ability to store a URL for each document in Synergy. This would be useful in cases where document is saved and imported from a web site. This could also be useful in cases where organisations would like to guide their users to a specific web site on a specific stage of a work flow. In this case, one can create a document in Synergy and link it to the desired URL and set that as a guideline for the task. We have added a new “Browse” button to some lists that contain documents (eg CCC, MCC, DCC, Task edit form and Favourite documents). If the selected document in the list contains a URL, then this button enables user to browse to the location. Please note that at this stage, the only validation done at this stage is to ensure that the entered string is not a file or directory. Please also note that there is no ability to change these URL strings in mass using the path relocation form.





- The timesheet tab of the task edit form has the ability to display the unapproved time for other users (all users apart from the logged user) in the timesheet tab. By default you will see the user's name and the total of the unapproved time for the selected task and that user. You can now double click on an entry on list of unapproved times for other users and view the detailed information for that entry. The details include the date of the entry, estimated and actual times and cost. These items will be displayed if you are licensed and turned on time costing system.



**Modification as at release 08.00.00**

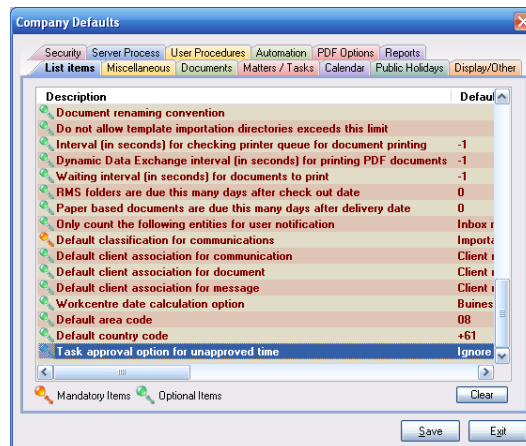
- ✚ Synergy is SQL Server 2008 ready. We have tested Synergy with SQL Server 2008 (Community Technology Preview, February release) and found no issues. The full testing will be conducted later in the year when SQL Server 2008 is officially released to public. Sites can download SQL Server 2008 CTP (February release) and do their preliminary tests. Please note that you need the correct ODBC or SQL Native Client drivers to connect to SQL Server 2008.
- ✚ Added a spin button to the start and end times in the communication form. Users can use the spin buttons or the arrow keys to increase or decrease the time. Also ensured that the start time never exceeds the end time.

The screenshot shows a Windows-style dialog box titled "Add Communication Details". It has a tabbed interface with "General" selected, and other tabs include "Classification", "Clients", "Security", "Tasks", and "Diary". The "General" tab contains several input fields and buttons: "Primary Client" with a search icon and a "Follow-up" button; "Client name" and "Phone numbers" (with up/down arrows); "Reference no." and "Rating" (with a yellow highlight); a "Filing..." button; "Direction" (dropdown) and "Publish in grapevine" (checkbox); "Our contact" (dropdown) and "Their contact" (with an "Assoc." button); "Contact method" (dropdown); another "Phone numbers" field; "Contact date" (with a search icon), "Start time" (with a spin button), and "End time" (with a spin button and a calendar icon); a "Notes..." button and a large text area; and a "Template" field. At the bottom, there is a "Duration" field and "Notify", "Save", and "Exit" buttons.

- ✚ Added a flag to workflow questions that allows users to avoid displaying them. These types of questions will be useful for capturing additional data, profiling and creation of follow-ups without user having to answer a question. It could also be used to link one branch of a workflow with another one without users having to know. The task will be displayed as a decision on the Matter Control Centre. Please note that turning this flag on will have precedence over recurring nature of a question.

*Modification as at release 07.00.01a*

- ✚ When changing the license type, users had to call ST Synergy head office for an unlock code. We have relaxed this requirement and only allowed users to change their license types from one version of SQL Server to another version. For instance, if your site is licensed for SQL Server 2000, changing this license type to SQL Server 2005 will required an unlock code in the previous versions. However, in this version, this change will not ask the user for an unlock code.
- ✚ When a master document is used for mass mail out without dispatching, the mail merge from the “Client Group Enquiry” was not working correctly if there was a client attached to the master document. Synergy is amended to ignore the clients of the master document and use the clients from the client group enquiry list instead.
- ✚ Changed the order of loading and unloading of the forms to achieve a better transition from the home screen to control centres and vice versa.
- ✚ If sites use background image, the background image does not get displayed when the user logs on for the first time. As user loads and unloads the control centres, the background image gets displayed. Amended Synergy to display the background image from the initial load.
- ✚ The list box of the diary tab was not displaying appointments on the last day of the month even though they were being displayed in the diary itself. Synergy is amended to display the appointments on last day of the month in the list box.
- ✚ When adding timesheet entries from the timesheet tab of the workcentre, it was impossible to know the public holidays. Synergy now displays the public holidays in red colour only when the user does not have time sheet entries. If there are timesheet entries, colour scheme will be identical to normal days.
- ✚ Synergy uses alpha numeric characters for construction of most of its primary keys. Unfortunately, some sites use the primary key of the documents table as reference number on their documents. To avoid having these offensive words appear on the documents, we have amended the document identifier generation code to filter out a range of offensive words. Please let us know if you discover any more and we will filter them out.
- ✚ In Version 07.00.01, Synergy stopped users from adding teams as secured users. This change inadvertently stopped the ability to add teams as matter approvers. This is fixed now.
- ✚ When using time cost, in some cases, it would be useful to warn or even stop a user from approving a task if there are unapproved time entries exist against the task that is being approved. Added a new setting at the housekeeping list item tab; that allows sites to do this.



- ✚ Added the ability to drag and drop documents from the windows explorer to Synergy. This will import the selected files into Synergy. The user will be able to select a document template which will be used for the importation of all documents. Drag and drop will use the copy method for importation; that is the original files will remain intact. This ability has been added to the Synergy desktop, shortcut bar, home screen, document control centre, task edit form, client control centre, work centre and postmaster control centre. Dragging documents to the workcentre will act as a postmaster import. The document properties form will not be displayed when dropping files to workcentre or postmaster control centre.
- ✚ Added ability to drag and drop emails from outlook to Synergy. This ability has been added to the Synergy desktop, shortcut bar, home screen, client control centre, work centre and task edit form. Synergy must be set up to use an email system for this to work.
- ✚ Added ability to drag and drop email attachments from outlook to Synergy. The importation of attachments are similar to drag and dropping of documents into synergy. The only difference is that by dragging email attachments to forms that does not contain a client (eg Document Control Centre etc), Synergy will try to find a single client using the sender's email address. Please note that if there are multiple clients matching the sender's email addresses, one of the clients will randomly be selected. Synergy must be set up to use an email system for this to work.
- ✚ In the message form, when right clicking on the attachment icons, Synergy was not selecting the entry. Code is amended to select the entry when user clicks the right mouse button on the icon.
- ✚ Allowed multiple communication forms to be launched from the Client Control Centre.
- ✚ Added a new timesheet tab to the task form. In this tab, all of the unapproved time entries will be displayed for the logged user on the top list view if there are any. The middle list will have one line for every other person that has unapproved time entry against the task being edited. The last list view is the same list view that used to be in the production tab display the total unbilled time for the task. This tab is always visible for unapproved tasks. For approved tasks, the tab is only displayed if there is at least one entry in the top or middle list. Please note that the buttons will only operate on the top list box. For approved tasks, the buttons will be disabled.

Task: In progress

Summary

Production

Documents

Pro-formas

Communications

Messages

Follow-ups

Diary

Clients

Guidelines

Chronology

Timesheets

Description	Client	Matter	Task	Estim...	Actual	Cost

User

Unapproved time

Description	Total	Write Off/Up	Tax	Invoice

Costed

Approved

Rejected

Uncosted

Properties

Approve

Submit

Copy

Add

Edit

Delete

Approve

Save

Exit



**Modification as at release 07.00.01**

- When Synergy is linked to a tax product, the tax tab of the client control centre is only made visible to those that are included in any of the security groups in the security tab of the client record. Additionally, if the client record is linked to a staff member, then that staff member is also allowed to see his/her own tax information.

From this version, we have used an identical approach for additional data. Sites can now mark an additional data type as private. The private additional data types will only be made visible to those that are included in any of the security groups in the security tab of the client record. Additionally, if the client record is linked to a staff member, then that staff member is also allowed to see his/her own private additional data types.

Please note that the primary clients of the matter would be used for security checking if the private additional data is also linked to matters.

In the previous versions, the security tab at the client form was only made visible when Synergy was linked to a tax product. As a consequence of this enhancement, the security tab of the client form will now be visible independent of the tax product.

When additional data reports are run within Synergy, the additional data security will be checked before the report is run. If Synergy finds any secured data that user should not view, the report will not be displayed.

Please note that there is no way for Synergy to check any of the user defined reports. If you have developed user defined reports that displays information from additional data tables, it is your responsibility to ensure that these reports are amended before adding private additional data types.

The screenshot shows a 'User Defined Table' window with the following elements:

- Tabs:** Definition (selected), Clients, Jobs, Security.
- Fields:**
  - ID: A text input field.
  - Description: A text input field.
  - Private: A checkbox.
  - Are items of this type to be displayed in their own tab?: A checkbox.
- Table:** A table with two columns: ID and Description. It is currently empty.
- Buttons (right side):** Add, Edit, Delete, Move up, Move down.
- Buttons (bottom):** Save, Exit.

- Added an end date to the recurring follow-ups. This end date allows sites to terminate a recurring follow-up when the calculated next follow-up date falls after the specified date. In these instances, the follow-up will be marked as inactive.

The 'Add Follow-up' dialog box has three tabs: 'Task details', 'Date details' (selected), and 'Escalation'. The 'Date details' tab contains the following fields and controls:

- Entry date: A date picker.
- Time: A time picker.
- Advance notice for follow up (in days): A text input field with '0'.
- Last follow up date: A date picker.
- ☒ This follow-up recurs every: A checkbox that is checked.
- 1: A text input field with '1'.
- Days: A dropdown menu showing 'Days'.
- Next follow up date: A date picker.
- Amount for every 1 day: A text input field with '\$0.00'.
- End date: A date picker.
- Users to be notified when follow-up is due...: A list box with 'Add', 'Remove', and 'Clear' buttons.
- ☐ Inactive: A checkbox at the bottom left.
- Save and Exit buttons: At the bottom right.

- Path relocation form is amended to include relocation of the import directories within templates.

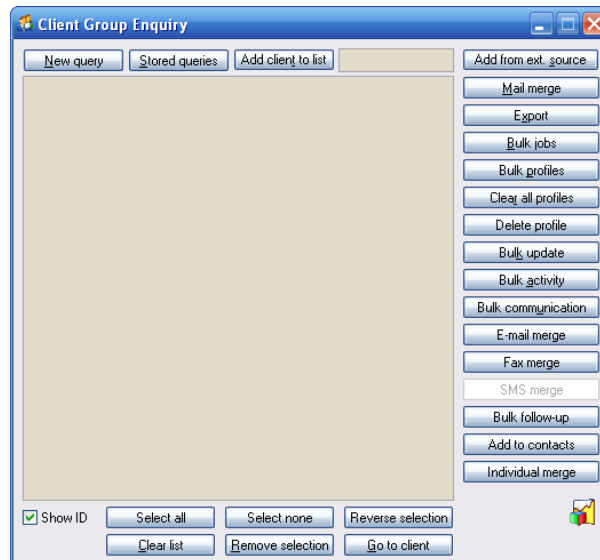
The 'Path Relocation' dialog box has a single tab labeled 'Templates'. It contains the following fields and controls:

- Look for: A text input field with a browse button.
- Replace with: A text input field with a browse button.
- Save and Exit buttons: At the bottom right.

- Added a bulk import button to the documents tab of the task from. This button allows importation of documents in bulk rather than one at time. The user will be given the option of finalising the imported documents. Also, Synergy will give you the option of inspecting each document as it is being imported. Please take extra care when you are using this approach with the “Move” importation method. If you click the “Exit” button instead of the “Save” button in the document properties form, you will loose the document because Synergy will move the document to its document server before displaying the properties form and will delete the imported document from the document server when you exit from the document properties from.

The 'Task: In progress' window has a title bar and a menu bar with 'Decision', 'Clients', 'Guidelines', and 'Templates'. Below the menu bar is a sub-menu bar with 'Summary', 'Production', 'Documents' (selected), 'Pro-formas', 'Communications', 'Messages', 'Follow-ups', and 'Diary'. The main area is titled 'Documents relating to this task...' and contains a large list box. To the right of the list box is a vertical toolbar with buttons: 'Guidelines', 'Import', 'Attach', 'Create', 'Launch', 'Properties', 'Detach', 'Send', 'Finalise', 'Delete', 'Check in', and 'Bulk import'. At the bottom of the window are 'Approve', 'Save', and 'Exit' buttons.

- Some documents may have replacement symbols based on client additional data. In the previous version of the Synergy, it was not possible to create this types of documents for multiple clients without having to go to each client and creating the document individually for each one of them. From this version onwards, we have added an “**Individual merge**” button to the “Client Group Enquire” form that allows users to select a master document and create a copy of the selected master for each one of the selected documents from the list. Please note that the master document must be marked as creatable from client otherwise, you will not be able to select it for this process.



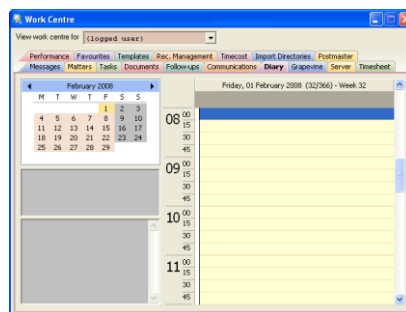
- Integrated Synergy with QuickBooks 2008 products. These products are using QuickBooks SDK version 3.0. Synergy dynamically determines the version of the product used and will amend the QuickBooks request accordingly.
- Enabled the documents list and the chronology list in the task form for approved tasks. This will allow users to scroll the list.
- Added an extra option to the popup menu of the task list on the Workcentre to allow creation of a communication for the highlighted task. This will reduce the effort needed to create a communications for any task in the list. Please note that if you have the delegation options selected, the task for that delegation will be used for the creation of the communication.

**Modification as at release 07.00.00**

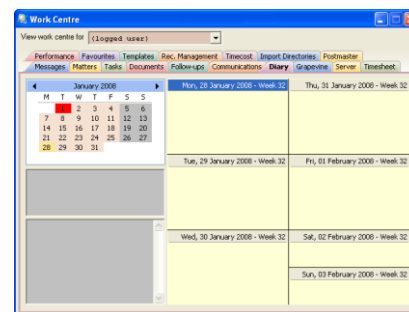
- ✦ Synergy is now Vista and Office 2007 ready. Windows Vista Business edition is used for testing purposes. Please let us know if you find any problems with other editions of the Vista OS.
- ✦ Please note that on this version, the CD contains synergy and server applications as MSI package. We will discontinue distribution of synergy in setup format from September quarter release. There are silent and interactive MSI packages. The silent packages will install the applications in their default installation directory (Program Files\Application Name) where as the interactive MSI package allows a user to change the installation directory.
- ✦ When clicking “Mail Merge” button from “Client Group Enquiry”, the mail merge process was failing. This is now fixed.
- ✦ Allowed telephone numbers, email addresses and Skype accounts to be copied using the right mouse click from the drop downs in the Client Control Centre.
- ✦ Please note that from this version, when a user minimises Synergy, it will be minimised to the **windows system tray**. A click or double click on Synergy icon on the tray will display the Synergy application.



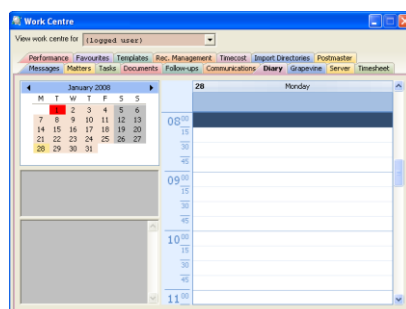
- ✦ We are now using a different diary component. With this component, the users have the option of using either office 2003 or office 2007 style calendar. Once you change the appearance of the diary from one location, it will change its appearance everywhere in the current session. Please note that these setting are not stored in the database and need to be reset after you have logged on to Synergy. We have removed most of the calendar colour setting from the house keeping apart from the appointment status colours.



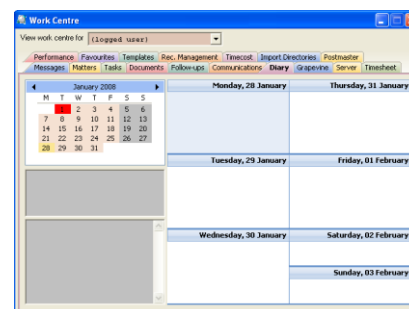
Office 2003 (Day view)



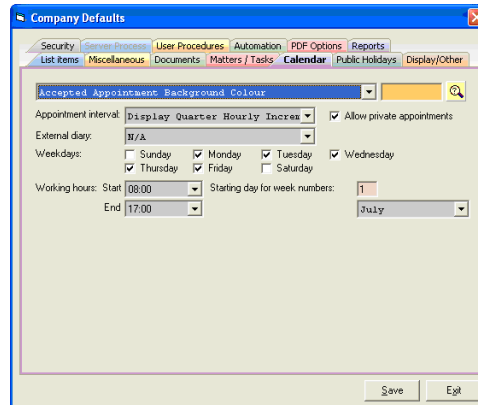
Office 2003 (week view)



Office 2007 (Day view)

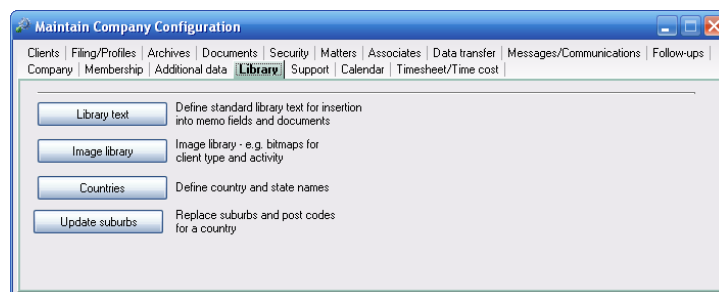


Office 2007 (week view)



Calendar tab at the housekeeping

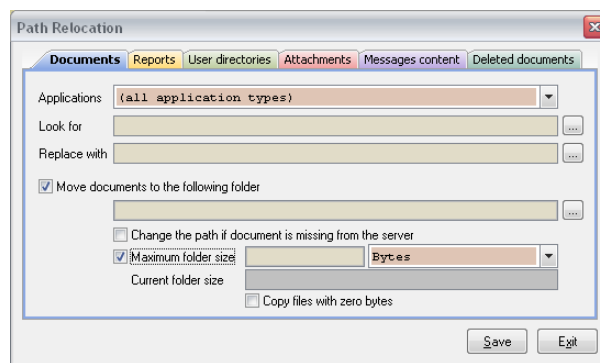
- ✚ Fixed a mail merge error 3047 for word documents for SQL Server databases.
- ✚ Added ability to maintain state names from the “Countries” button in the housekeeping form’s “Library” tab. Also added ability to replace suburbs by downloading the suburb and postcode data file from Australia Post’s web site [www1.auspost.com.au/postcodes](http://www1.auspost.com.au/postcodes) using the download section. The downloaded file is in csv format. However, you need to convert this to an Microsoft Excel format before using it in Synergy. Use the “Update suburbs” button to replace the existing suburbs with those in the newly downloaded file. Also allowed to maintain states. You can now delete, the states and countries but when you delete states, if suburbs are linked they would be deleted if you confirm the deletion.



- ✚ We have added user tracking to Synergy. Every time a user logs into Synergy, various details are captured in a user log table. When they log out, the record is stamped with the log out date and time. At this stage, there is no interface for the information held on this table. However, in the future versions, we may extend logging to other operations (like opening/printing documents etc.) and add reports or form for viewing information from this table.
- ✚ In certain cases when you enter the completion date for a task and then click the approve button, the completion date was overwritten with the current date. One example of such case is when you are approving a concurrent task that does not have any other sub-task. This bug is fixed now.
- ✚ When importing messages from outlook, the send date was being used as the sending date of the message. However, Synergy is using the current date for the creation date of document (msg file). As a consequence, the chronology was out of sequence. To correct this anomaly, we have used the send date of

the message as creation date of the document from this version onwards. However, the entry date of the document remains as current date.

- When relocating document paths and moving files from their original folder, missing documents would have stopped the process and files with a size of zero bytes would have forced the user to continue without limiting the folder size. We have added two new check boxes to this form to assist this process. The “**Change the path if the document is missing from the server**” check box will allow Synergy to just change the path of the document in the database if the physical file was not in the document server. “**Copy files with zero bytes**” check box allows Synergy to copy the files regardless of their size. Please note that if you are moving files and you do not select these check boxes, then the process will stop on the first missing document or file with zero byte size.



- In scanning form, when a user selects to send an internal message, all of the related clients were being added as clients to the message. From this version, the message will only be linked to the primary client selected in the scanning form.
- In previous versions of Synergy, the “Create Invoice” button from the follow-up tab of the housekeeping form, were only available for the sites with QuickBooks accounting link. We have made this button available for all of our customers. For those that have accounting links to QuickBooks, the function remains identical to the previous versions. For those that do not have QuickBooks accounting, Synergy will create a tab delimited file containing the amounts and the GL/Tax codes. This file could be used to import the transactions to the MYOB accounting system.
- Synergy has the ability to automatically associate matters and documents using specific association categories. These categories can be stored at the housekeeping (company wide), against matter types and master matters. The scanning form uses these association categories to relate documents and matters scanned/ created to the relevant clients. In some cases, users do not create workflow matters from this form and they only want to scan documents and attach them to the clients. In these cases, using the above mentioned association categories may not necessarily be correct. We have added a new association category in the company default form specifically for the scanning form. The association category in the scanning form will be defaulted to this association category if selected. Otherwise, other association categories will be used as before.

Company Defaults

Display/Other Security Server Process User Procedures Automation PDF Options Reports

List Items Miscellaneous Documents **Matters / Tasks** Calendar Public Holidays

Task sequence name

Task sequence starting number

Target date default days hence  ☐ Use business days for calculation

Enforce entry of target date ☐

Enforce entry of approval date ☐

Automatically copy associations ☐ ☐ Enforce associations to be in one category

Category for scanning

Importation task limit

Matter name  Singular form  Plural form

Progress description  Singular form  Plural form

Matter deletion and master matter creation security level

Save Exit

- When system administrator sets a security group for deleting tasks, the task approver and the creator of the matter can delete the task in addition to all of the people in the security group. Some customers have requested to restrict this even further by not allowing task approvers or the matter creators to delete the tasks interactively. We have added an option as highlighted below. For now, this option will only be enforced from the task tab of the Matter Control Centre and the Jobs tab of the Task Control Centre. Please note that we may expand this in the future to cover other areas where tasks can be deleted.

Company Defaults

Security Server Process User Procedures Automation PDF Options Reports

List Items **Miscellaneous** Documents Matters / Tasks Calendar Public Holidays Display/Other

Email system  Message polling  minute(s)

SMS system  SMS Gateway

Facsimile system  SMS length

Skin/Style file  ☐ Account number length

Tab style  ☐ Start number from

☐ Display matter form when creating new ones from workflow decisions

☐ Do not allow creation of new matters from inactive masters

☐ Exclude future matters

☐ Extend task approvers to include matter approvers

☐ Keep user details when creating matter from master

☐ **Restrict task deletion to those on the security group**

☐ When approving a task, allow addition of the delegation to active sub-t

☐ Bypass addition of the delegation to active sub-task when sub-task has

☐ Display the tasks to the user when delegating

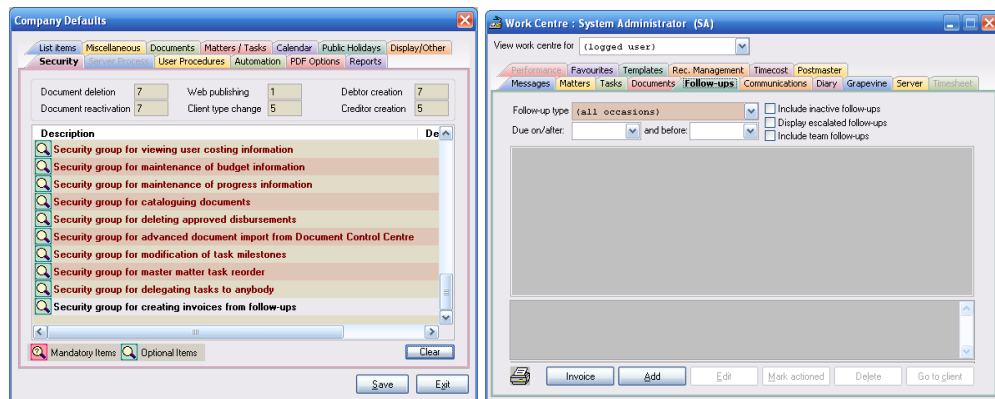
☐ When workflow answer is mapped to silent decisions, process them imm

☐ Message Addition of facsimile cover sheet is optional

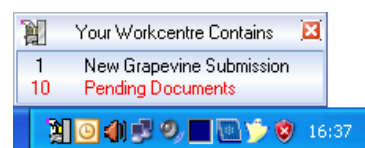
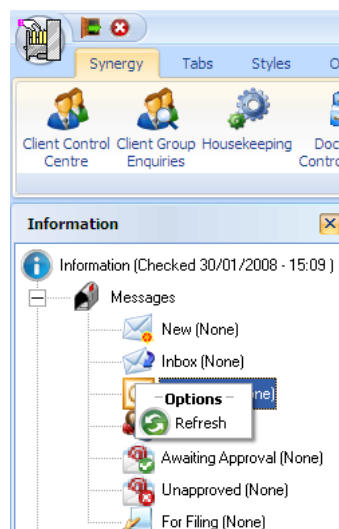
☐ Allow deletion of viewed messages

Save Exit

- Added a new security group that controls who has clearance to create invoices from follow-up. In many cases, the housekeeper many necessarily be the person that is responsible for creating these invoice in their QuickBooks or other accounting systems. If this security group is set up, then, a new “Invoice” button will be displayed in the follow-up tab of the workcentre for the users in the selected security group. Clicking this new button will display the same form as “Create Invoice” button from the follow-up tab of the housekeeping. In the absence of this security group, only housekeeper can perform this operation from the follow-up tab of the housekeeping. Please note that this button will always be available for “Systems Administrator” as SA is included in all security groups.



- ✚ The importation of data from another synergy database was not copying the users correctly from delegation when the source synergy database was a Microsoft Access based database. This is fixed now.
- ✚ We have changed the tool bars and the shortcut bar of the application. In the previous versions only users that were in a specific security group were able to add customised application icons to their short cut bar. We have removed this restriction as this seems to be useful for all users.
- ✚ In the previous versions, users would get notification (message counts) either as a message box or a popup window. From this version, we have replaced the notification message and the popup window with an information tab in Synergy's shortcut bar (on the left hand side of the application). This window will display all of the information that was displayed before. A date and time (dd/mm/yyyy HH:MM format) will indicate the date and time when the information was last updated. If an entry has changed since last check, the entry will be displayed with a red bold font to indicate a change in that particular entry. As before, the refresh interval for this information remains identical to what it was in the previous versions. A double click on any entry will cause the work centre to be loaded with appropriate tab and option displayed. Also, you can refresh the information at any time by clicking the right mouse button on any of the entries and then selecting the refresh from the popup menu that get





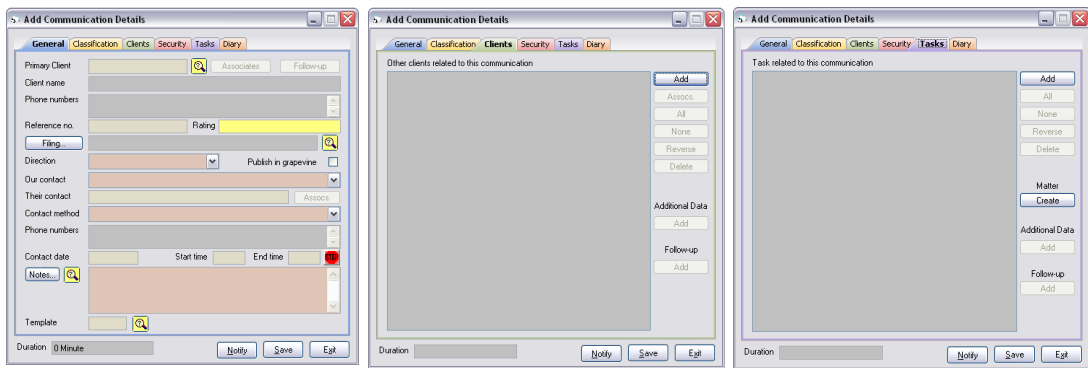
- ✚ The Synergy application now uses an office 2007 style ribbon bar to display various menu options and tool bars. Please note that the displayed tools still dependent on the user setting.
- ✚ When importing clients from the data transfer tab of the housekeeping, if the account number column in the source table does not contain data, Synergy was not importing the record. We have changed this behaviour so that in these cases, Synergy will generate an automatic account number if the system allows it to do.
- ✚ There was a bug in the system that was using a maximum of 7 characters for the primary keys of ZZCLIADR, ZZDOCSEC and ZZDOCUSC tables even though these tables have an 11 character primary key. This bug is fixed and the primary keys of these tables would be fixed as part of the upgrade process.
- ✚ Synergy allows users to base a replacement symbol on an entire document. When this is done, Synergy will use Insert File option of the word application to replace the symbol with the entire document. Previously, there was no way of setting a default document to be used for the replacement operation. In this version, we have allowed to set a default document for replacement. Please note that the default document must pass all of necessary validation. If it fails on any of the validations, then the default will be removed. The replacement document:
  - 1) Must be a digital document,
  - 2) User has to have privilege to use the document,
  - 3) Must be available for use (that is not checked out etc)
  - 4) Must have the correct classification.

- ✚ Control C/X/V was not working on the comments field in the template maintenance form. These key combinations should work now.

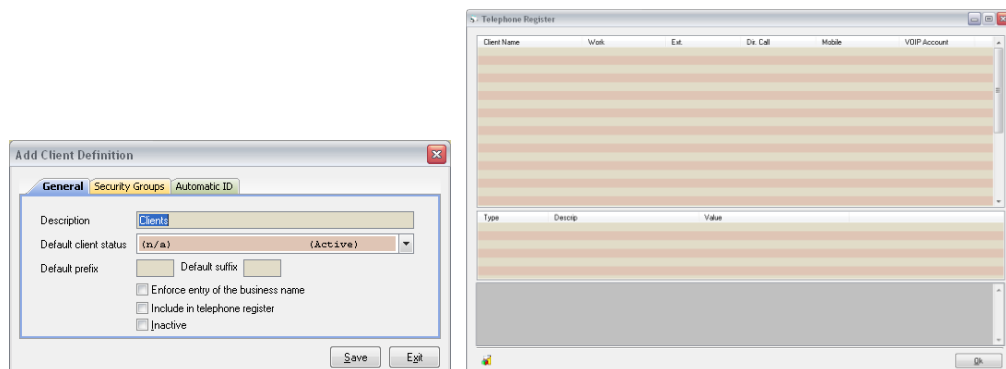
- Added ability to search for matters by the related client of the matter.

- The tree view that displays full matter details will now display the work and mobile numbers of the staff member responsible for the entry. In future releases, we might add this detail to various lists and tree views. This can be turned off from company defaults if an organisation prefers to hide these numbers (I cannot see why one would hide it but nevertheless). The option is described as “Display staff phone numbers” and it is in the Misc tab of the company default form.

- There was a bug in the task report that could be run from the task tab of the Matter Control Centre. Please copy the ZZTASKHA.RPT file from the CD if you have not customised this report.
- Staff teledex, clients and client teledex options on the favourites tab are now all display the same information on the list box. When user clicks on an entry, the current appointments for the selected client or user is also displayed on the text box if the use can see the appointment details. The mobile number of the staff or client is also displayed.
- Added ability to create client/task related follow-ups from the communication form. Also added an extra text box to display the phone number of the associate when it is selected. The original telephone number text entry has moved up under the client name. This text box will display the phone number for the selected client.



- Created a phone register icon in the user shortcut bar as well as a report. This form can be invoked from the information side bar. The report can be printed using the print button on the form. The form will display all staff and those clients which are allowed to be in the phone register based on their client type setting. There is a new check box in the client type form that allows you to include the clients in the phone register. The ability to use clients in the phone register is designed to be used for internal resources such as rooms. Please copy ZZPHONER.RPT to your system directory where other Synergy system reports reside. As you select the entries on the top list, all additional phone numbers stored for that entry is displayed on the second list below it. If there is an appointment with one hour of the current time (half and hour before and half an hour after the current time), the details of the appointment is displayed in the text box if the user has security clearance to see the details.



- Added the top tier description of the association to the related client tab of the add matter form.

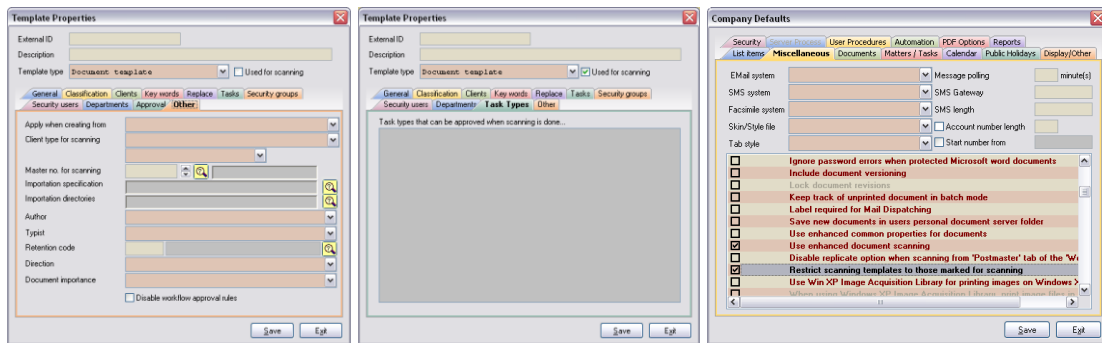


- Users can now search for matter related communications and messages from the advanced enquiry forms for these entities.

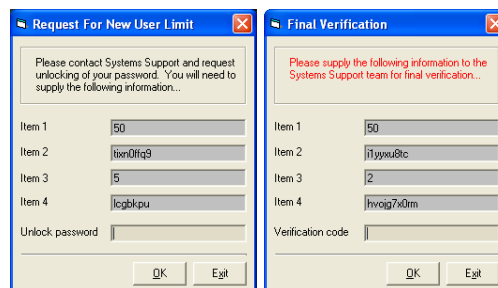
- When message templates are used in creating messages, if the template contained the body of the message, the user signature was not being added to the bottom of the body. This is fixed now.
- When time costing module is enabled, documents are checked out and then checked back in when the users has finished with them. However, if checked out documents are deleted from the database using back database management tools, the check in process would be unable to complete the process as the record has been removed from the database. We have altered the check in process slightly to update the time cost entry for that document and remove the check out record from the database.
- Sometime, users may not want all related clients of a specific association category to be related to a newly created matter. To cater for this, the matter form was altered a few versions ago to allow display of the related clients and ability to remove those unwanted related clients from the matter. Despite all of our efforts, experience has shown that users still forget to check the validity of the related clients when creating these matters. We have introduced a warning flag that a system administrator can turn on. When this warning flag is set, the user will be asked whether s/he has checked the related clients. This flag is off by default to preserve the previous behaviour of the synergy.

- Added a flag to the document templates to allow them to be earmarked for scanning. We have also added the document importance to the template. When the scanning flag is set, the users can now specify certain task types to be approved after the documents are scanned against an existing task. In this case, the task edit form will be displayed and the approve button will be pressed automatically if the user can approve the task. The sites can use a housekeeper setting to indicate whether the scanning from should only show

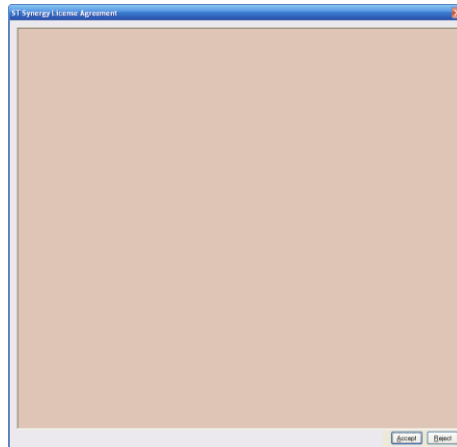
those templates that are marked for scanning or it should display all of the document templates.



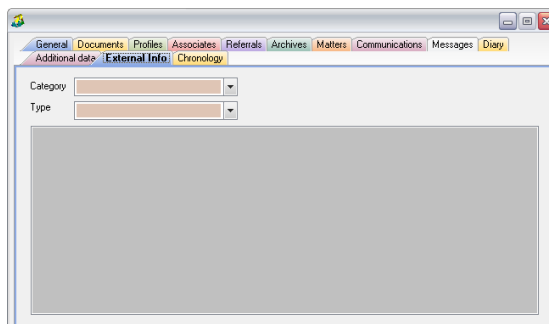
- ✚ Synergy allows sending of faxes even when the faxing was not enabled from the housekeeping; this is now only enabled if the faxing is enabled. The fax and SMS icons are made invisible when faxing and SMS is not enabled.
- ✚ If a client had additional phone number, the client deletion was failing. This is fixed now.
- ✚ The short cut key for approving tasks in the task edit form (Alt + A) was clashing with other short cuts on the form. Changed this to be (Alt + V).
- ✚ Sometimes users are required to change their license setting. When any license attribute is changed, the user is required to call and receive and unlock code. Given that the lower case letters on item 2 and 4 is sometimes hard to read, we have added the upper case version of these items as tooltip text. So if you move the mouse over the item 2 or 4 text boxes and leave it there for a second or so, you should see the same text in upper case as tooltip text. A final verification step is also added to the license change process to ensure that all setting have been altered successfully. You would need to go through identical process with this final step.



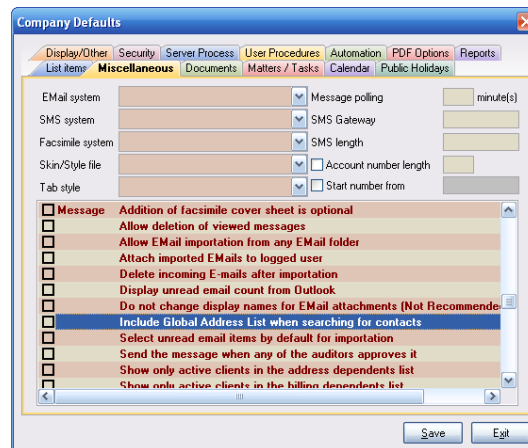
- ✚ ST Synergy Ltd has realised that a number of our customers are not familiar with the Synergy's licensing agreement. Consequently, they may unintentionally do things that are contrary to their licensing agreement. From this version, the system will display the license agreement when a user is logging on for the first time to a company. The log in process will only continue if the user accepts licensing agreement and when accepted, the date and time of acceptance will be recorded in the database as well as a history table. Please note that this acceptance will have to be repeated on upgrades as well.



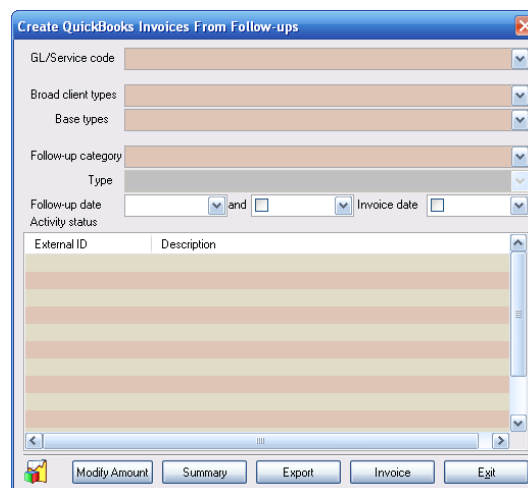
- +
 The content of the form be Synergy's agreement which is not displayed here.
- +
 When bulk approving matters, the assessment date and delegation status needs to be updated. In the previous versions of Synergy, these two updates were done in a single pass. To preserve the entered assessment date, the update statement only updated the records where there was no assessment date. This cause the status of some delegations (those that had assessment date) to remain as it was. Consequently, it was possible to have an approved matter with active delegation still attached to it. From version 5.00.04, the update statement was split into two step process; the first step was to update the assessment date where they were not entered and the second step was to update the status of delegation. However, the upgrade did not fix the existing records in the database. In this version, delegation with status other than approved or bulk approved will be updated to bulk approved if they are attached to bulk approved tasks.
- +
 Made external information tab of the CCC invisible if external information is not configured.



- +
 Added an option that allows users to include the Global Address List from Exchange Server when searching for email addresses in their contacts list. With this option in place, Synergy will return all matching entries from the Global Address List if an SMTP addresses can be found for them.



- ✚ The document, communication and message security were allowing teams to be added to the users list. Since there is no team based security, in some case this was locking everybody out of the document. From this version, we have put validation in place to stop addition of teams to security lists.
- ✚ When single logon was being used for a company, using change user to logon as a different user were not validating the password. Validation has been added to Synergy to ensure that the user's password is valid before logging in.
- ✚ When time cost is turned on or document security is in place, launching any non-invoice documents will check the document out to the person that has launched the document. From that point onwards, s/he will be the only person that can change the document properties. If a user changes the security setting of a document while s/he has got it checked out, the document will be locked from access by anybody if s/he removes herself/himself from the security setting. Even Systems Administrator would not have access to the document. To avoid this from happening, we have allowed System Administrator access to the document properties regardless of the check in/check out status of the document.
- ✚ Added a new report that allows users to easily determine which clients will not be invoice through follow-ups. This invoicing is usually available for clients with QuickBooks accounting integration and can be done from the "Create Invoice" button from the follow-up tab of the Housekeeping form or via the workcentre follow-up tab for those users that have the security clearance.



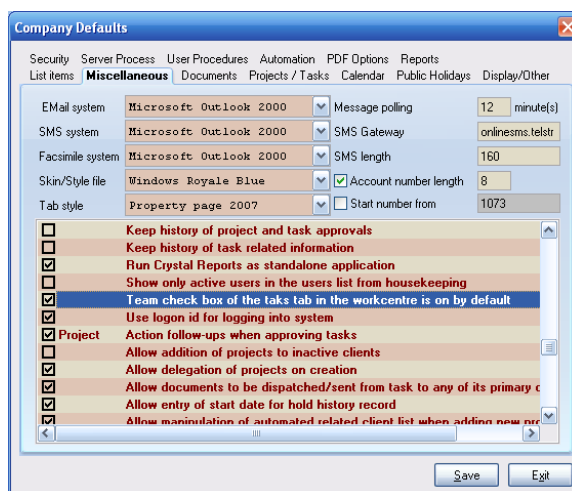
- Allowed users to filter the costing details by matter type. This form can be displayed by clicking the costing button from the matters tab of the Client Control Centre.

- In the favourites tab of the work centre, added a new popup menu option for document type favourites that allows copying of a selected document from the list. Once the document is copied, the user will be asked if s/he wants to add the newly created document to her/his favourites.
- When selecting “Go to client” or “Go to matter” from the timesheet tab of the workcentre, the CCC or MCC was only being displayed if the timesheet entry was costed. Changed so that if the timesheet entry was not costed, the CCC or MCC was loaded with the original client or matter.
- There was a bug in creating a communication template from an existing communication. This is fixed.
- When tasks were added to communication template, these were not being copied when that template was being applied to a communication. The tasks will now be copied.
- Changed the document list in the task form to a sortable list view.

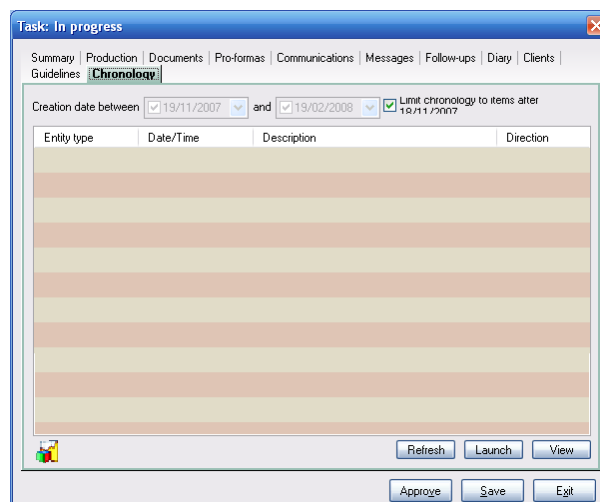
- In some instances, the editing of the client types was causing an overflow. This could happen when the next account number is set to values beyond what a 32-bit long integer can hold. Changed to form to use a different conversion routine to overcome this overflow issue.



- ✚ In previous versions, when editing a time entry in the workcentre, once the time cost form was saved, the list on the workcentre was not being updated. This is due to the fact that the time cost form is loaded in a modeless mode. The workcentre timesheet list would be updated when the time cost entry is saved.
- ✚ Allowed the Department of Social Security number to be renamed for clients.
- ✚ Allowed mapping of external clients to an existing client during conversion. This is controlled by a housekeeping option called “**Allow mapping external clients to existing clients on conversion**”. This is available from the miscellaneous tab of the company defaults form in the “**Other**” section.
- ✚ Added a setting to the housekeeping, company defaults that allows site to control the default value for the team check box in the task tab of the workcentre. It is located on the Misc tab of the company defaults under the “**Other**” settings.



- ✚ Added a chronology tab to the task form. Please note that there is no delete button on this tab since the entities that are listed might be present in other lists in the form.



- ✚ Consolidated all of the Synergy server processes into one application called “STServer.exe”. Please ensure that when you are installing this version, all of

the previous server applications are uninstalled first before installing the new server application. When the new server application is started, you need to relocate the Startup.mdb. Then, you can select a company and all available server processes for that company will be listed in the server type drop down. Select the server that you want to start, enter the administrator password and then click the “OK” button.

Please note that the Client Synchronisation Process will always be listed in the server types drop down. Servers have to be started manually for the first time and thereafter, the company setting will take effect allowing the server to logoff and on based on the server setting for the company.

The only exception to the rule is the Client Synchronisation Process. You can start the server application to perform client synchronisation from command line or batch files. You need to pass an extra parameter in addition to all of the previous parameters that you were passing to server program. This parameter is “SS” (double quotation marks must be present; this must be the first parameter being passed to the program). This will indicate to the new server application that it is to take the role of the Client Synchronisation Process. All other parameter should be preserved in value and position from the previous version.

Please note that the new server application “STServer.exe” will be installed in “C:\program files\STServer” directory. Consequently, if you are starting the server through an automated batch file, or scheduled an operating system job to start this application, please ensure that the path is corrected and you are passing the extra parameter in position 1. The following command line will start the server application as Client Synchronisation Process:

```
"C:\program files\STServer\STServer.exe" "SS" "\\server\sysdir" "My Company" "No"
```

The above command line assumes that your Startup.mdb is located on a share called sysdir on a server called server. It also assumes that you want to synchronise a company named “My Company” in that Startup.mdb database and you do not want the final message box to be displayed.

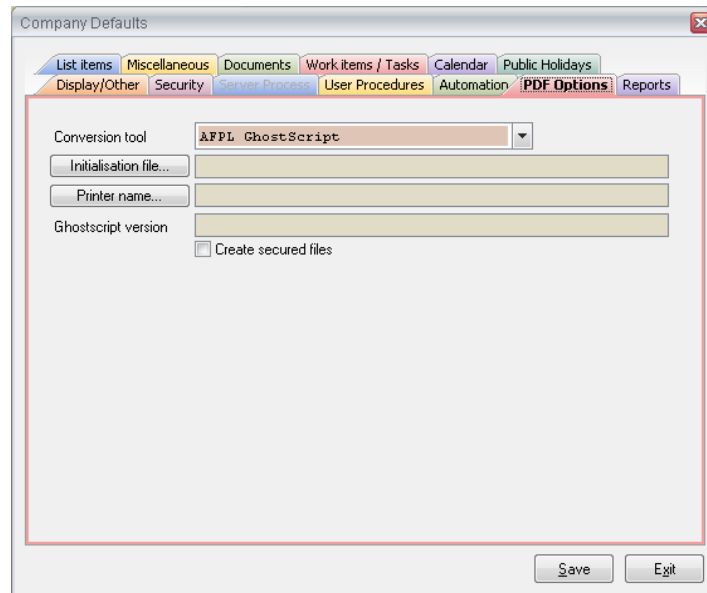
Please let us know if you have any difficulties in running the Client Synchronisation Process.

***Modification as at release 06.01.00a***

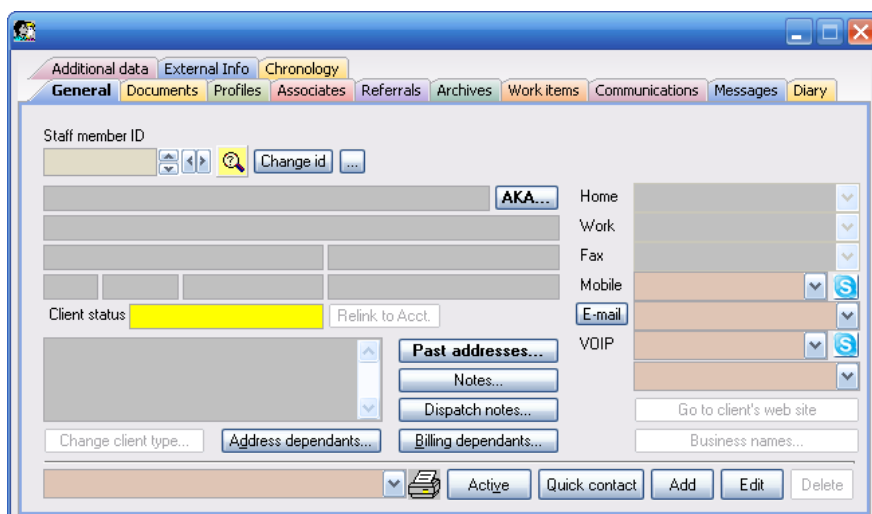
- ✚ Fixed some bugs in Client Synchronisation process that was introduced due to extensive changes to the accounting system integration.
- ✚ Fixed some bugs related to user log in that was introduced due to extensive changes to the accounting system integration.
- ✚ Changed the Synergy report viewer to allow those reports without DSN to run. This is highly depending on the way the tables are linked into the report and may not work all the time.

### *Modification as at release 06.01.00*

- ✚ Added a new security group that allows a selected group of users to delegate tasks to anybody they wish to.
- ✚ Allowed sites to create secured and unsecured PDF files when Ghostscript PDF conversion is used.



- ✚ Integrated Synergy with Skype. A Skype button is added to the CCC that allows users to call the selected client. The following conditions have to be true before a call can be made:
  - The logged user must have a Skype account name in his/her client record.
  - The Skype application has to be installed on the PC.
  - The Skype account entered on the client record must be able to logon and connect to the Skype application.
  - If calling land line or mobiles, the stored phone number must be entered in a way that is acceptable to Skype. Skype usually accepts phone numbers in the format +CCAAPPPP where CC is the country code and AA is the area code and PPPP is the phone number.





Sites can now store unlimited number of phone, fax, and email etc. details for a client. These details can be entered when editing an existing client using the “Add More” button where the phone numbers are displayed. Please note that these details are only displayed on the Client Control Centre and are not merged into the documents.

The 'Edit Staff members' form is a multi-tabbed interface. The 'Tel/E-Mail/Misc.' tab is selected, revealing contact and identification details. It includes fields for various types of telephone numbers, email, and a Skype ID. There are also fields for tax-related information and business details. A 'Display in telex' checkbox and a 'DSS' field are present. The 'Add more' button is located next to the 'Direct call' field. At the bottom, there are checkboxes for 'Member' and 'User', and 'Save' and 'Exit' buttons.

The following form allows users to add the new information.

The 'Add Phone/Email/VOIP details For Client' form is a simple interface for adding new contact information. It features a dropdown menu labeled 'EMail' and a text field for 'Description'. An 'Add' button is located to the right of the 'Description' field. An 'Exit' button is located at the bottom right of the form.



Added a new field for clients that enables users to store user names for online VOIP systems (like Skype) and their type. For now, we only integrated Synergy with Skype. However, this could be extended in the future. There is provision to store only one main account name per client similar to email and phone numbers.

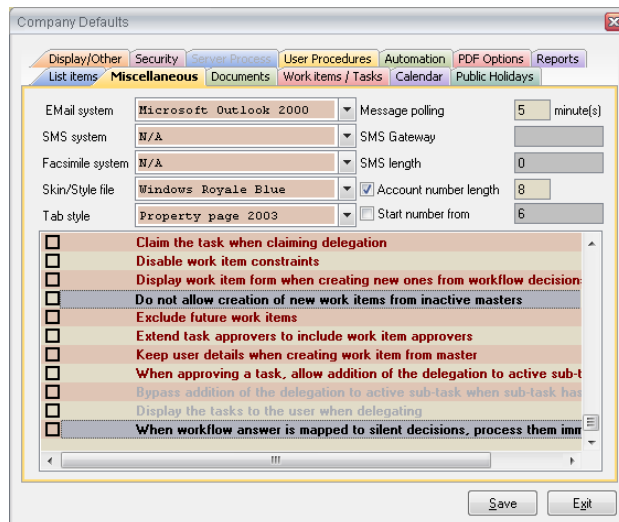
- Allowed housekeepers to inactive master matters. Those that have access to modify master matters will be able to inactivate them as well.

- Added two new check boxes to the matter search screen. This will allow users to search for active/inactive master matters.

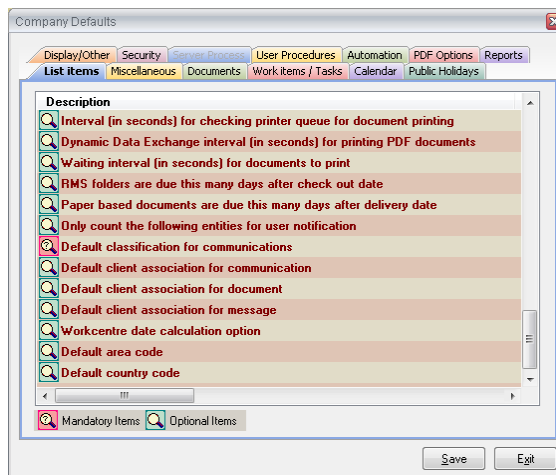
- ✚ The master label for the inactive masters will be displayed in a red colour.

- ✚ Removed the inactive matter types from the matter drop down list on master matter selection form. Also a new text box will display the matter notes when a matter is selected from the list.

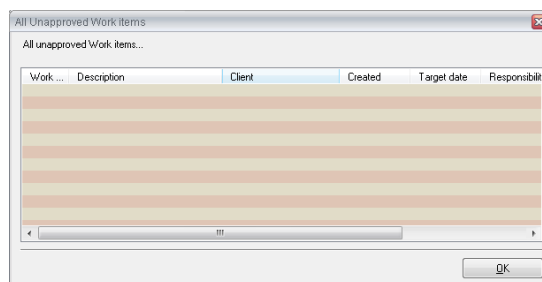
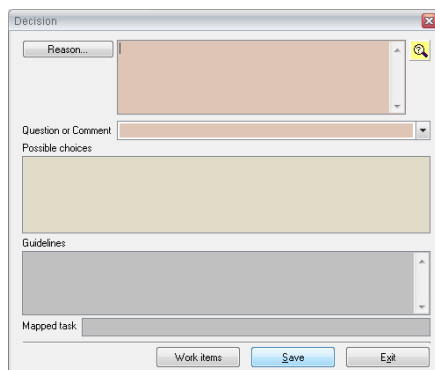
- ✚ We have altered the colour coding of the workflow image. The silent tasks/decisions will now be marked with the word “Silent” on the image. This will allow easy identification of the silent task on the image. The colour of the edges between the tasks and the decisions are changed to black. The only coloured edge will be those leading to a silent task/decision.
- ✚ Added a new option for the matters in the housekeeping that enables sites to disallow using of inactive master matters for creation of new matters.
- ✚ Added an option to enable silent task to be configured as decisions and processed straight away as soon as they are created from the mater workflow. Please remember that until this version, there was not possibility of infinite loop in workflow processing. However, with the introduction of this option, it is possible for the workflow to be incorrectly configured and result in an infinite loop. Please make extreme care when you are using this option and ensure that in any of such loops, there is at least one exit path.



- Added ability to store the default country code and area code. These would be use when adding extra phone and fax numbers for clients.



- When a decision is being made, sometimes the users may want to see the related matters that exist for the matter that they are operating on. Added a new button the decision form that allows viewing of all the related matters to the matter that is being worked on as well as all the matters for the primary client of the matter that is being worked on. Please note that approved matters will not be displayed.





- Allowed the debtor and creditor tab to be made visible or invisible for any accounting system that is linked to Synergy. This can be set from the accounting system form from the housekeeping.

The 'Set Accounting Host' dialog box contains the following fields and options:

- Other products: Accounting Host (dropdown menu)
- Name to use: Accounting (text field)
- Name debtors as: Debtor (text field)
- Name creditors as: Creditor (text field)
- Accounting product: None (dropdown menu)
- Database type: None (dropdown menu)
- Buttons: Save, Ok
- Checkboxes: ☐ Delete intersection tables, ☒ Allow debtors to be linked, ☐ Debtor tab visible, ☒ Allow creditors to be linked, ☐ Creditor tab visible

- Displayed two new columns on the matters tab of the Client Control Centre called PCT% and Reason. The PCT is the total completion percentage for the matter and the reason is the task hold reason if any task is on hold. Please note that if there is more than one task on hold, a single reason will be displayed with “...” at the end of it.

The 'Work items' tab displays a table with the following columns: Person responsible, Created, Target date, Status, PCT%, and Reason. The table contains several rows of data. Below the table are buttons for Costing, Submit, Add, Go to work item, and Delete. Above the table are search and filter options: Work item (dropdown), Year (dropdown), Adv. search..., Include completed work items, Exclude future work items, Client is the work item owner (radio button), Client is otherwise related to the work item (radio button), and View secondary responsibility (checkbox).

- Added a new option to the housekeeping to allow users to specify the date received of a matter before the matter and tasks are created. This would be useful if you want to create a matter that has received date in past or the future. In the previous version, the date received can only be changed once the matter is created. However, at that point, all of the tasks and delegations are already created with the current data. So changing the date in the Add/Edit matter form would not have changed any dates on tasks or delegation. With this option enabled from the housekeeping, the user can specify the date received which will get used to create the tasks and everything else.

- When creating matters from a template, if you specify a single matter to be created, the following form was not appearing. In these instances, if you wanted to set the matter receive date to any date apart from current system date, you had to do that in when matter Add/Edit form was being displayed. However, as explained above, at that point the tasks and everything else has already been created and changing the receive date will not change anything. In this version, if the above mentioned housekeeping option is turned on, Synergy will display this form so that the user can set up the received date of the matter even if it is a single matter. Please note that in this case, the user cannot change the frequency or the number of matters as this is read from the template.

- Fixed a bug in mail merge form. This bug was related to the snap shooting the client and document details.
- Added a common properties option to the popup menu that is displayed on the documents tab of the Document Control Centre. This option allows a user to apply common properties to selected documents from the list. Please note that this option is only available to the housekeepers (those with priority level 1 and 2).



Added a new option to the common properties form that allows users to include or exclude the finalised documents from application of common properties. As part of applying common properties, the clients of the documents have to be copied to all of the selected document. This process will fail for finalised documents since the common properties process was not deleting the dispatch history. Since we did not want to destroy the dispatch history automatically, we have placed this option on the form. If you decide to include the finalised documents, the document will be reactivated first, the common properties will be applied next and the document will be finalised at the end. Please note that if you do this, the physical dispatched documents may be different to what is kept in the database.

**Apply Common Properties**

General options

- ☐ Retain the original document name
- ☒ Replace user priority level
- ☐ Replace author
- ☐ Replace typist
- ☒ Replace document direction
- ☐ Replace importance
- ☐ Replace archive information

Comments options

- ☐ Append document comments
- ☐ Replace document comments
- ☒ Retain the original document comments

Finalised documents options

- ☐ Include finalised documents
- ☒ Exclude finalised documents

Continue Cancel

**Modification as at release 06.00.10**

- ✚ In some instances, one may want to use the sequence number from housekeeping for the newly created matters but may not wish these sequence numbers to be added to the start of the matter description. In Version 06.00.09 we introduced a single option that allowed both of these to occur. In this version we have separated the two into two separate checkboxes as can be seen from the image. If you request to add the sequence number to the description, then you will be forced to select the “**Set sequence number**”.

The screenshot shows the 'Add Matter Category' dialog box. It includes fields for 'External identifier', 'Description', and 'Budgeted time'. There are checkboxes for 'Warn users if there is no budget set', 'Target date is not mandatory', 'Add sequence number to description', and 'Set sequence number'. It also features a 'Client association category to copy' dropdown, security settings for addition, modification, and deletion, a default filing category, and a section for 'Invoice number details' with fields for length, prefix, starting number, suffix, and a sample invoice number. 'Save' and 'Exit' buttons are at the bottom right.

- ✚ There were some bugs in the QuickBooks server related to the two newly introduced accounting systems. These should be fixed now.
- ✚ Added a new report called “Client Fee History” to time cost report. Users need to copy ZZCLICMP.RPT from the CD to your system directory.

**Modification as at release 06.00.09**

- Added an option to the matter types that allows users to use the sequence number set at the housekeeping to be used when creating matters from master matters. This option will set the sequence number of the new matter to be whatever is set at the housekeeping as well putting the sequence number at the beginning of the matter description. Please remember that this will only happen if the sequence number is set to a non-zero number.

External identifier  Target date days hence  ☐ Use business days

Description

Budgeted time  (in minutes)

☐ Warn users if there is no budget set

☐ Target date is not mandatory

☐ Use sequence number and change description

Client association category to copy

Secure addition to

Secure modification to

Secure deletion to

Default filing category

Profile based benchmarking details

Invoice number details

Invoice number length  ☐ Fill with leading zeros

Prefix

Starting number

Suffix

Sample invoice number

☐ Inactive

- Fixed a bug in creating the primary keys for debtors and creditors linked to the Vision system. Vision uses a special character as the second character in their primary key field. In cases where records in the table do not contain this second character as the second character, Synergy may create duplicate identifiers. This is fixed at this version.

### *Modification as at release 06.00.08*

- ✚ Increased the length of external identifier for templates from 5 characters to 16. This should give users more flexibility in naming templates where there are quite a number of them.
- ✚ This version of Synergy will not enforce entry of target date for master matters and all of their tasks.
- ✚ In the task form, users can link templates relevant to that particular task. We have added a warning message when users are linking inactive templates. We have also removed the inactive templates from template list for tasks of non-master matters.
- ✚ Added a check box to the matter types that allows users to specify whether target date for that matter type and all its tasks are mandatory. If this check box is ticked, then Synergy will not enforce the entry of target dates even if the house keeping setting is set to enforce it.

The 'Edit Matter Category' dialog box contains the following fields and options:

- External identifier: Text field
- Target date days hence: Text field
- Use business days: ☒
- Description: Text field
- Budgeted time: Text field (in minutes)
- Warn users if there is no budget set: ☐
- Target date is not mandatory: ☐
- Client association category to copy: Dropdown menu
- Secure addition to: Text field
- Secure modification to: Text field
- Secure deletion to: Text field
- Default filing category: Dropdown menu
- Profile based benchmarking details: Large empty text area
- Invoice number details:
  - Invoice number length: Text field
  - Fill with leading zeros: ☐
  - Prefix: Text field
  - Starting number: Text field
  - Suffix: Text field
  - Sample invoice number: Text field
- Inactive: ☐
- Buttons: Save, Exit

- ✚ In many places in Synergy, users can select a template by typing their external identifier (e.g. document importation form). In the previous versions, Synergy was returning the template even if the template was inactivated by system administrator. We have fixed this oversight. From this version onwards, only the templates that are active will be considered for selection.

The 'Select Document to Import' dialog box contains the following fields and options:

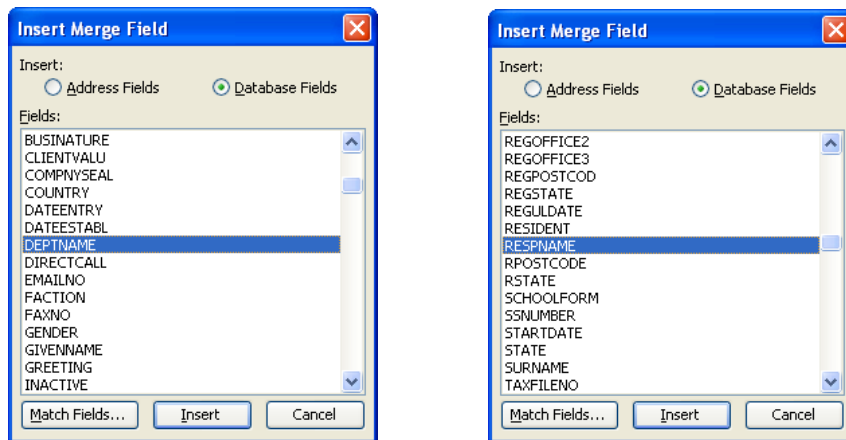
- Document type: Dropdown menu
- File location: Text field
- Template: Text field
- Importation method:
  - ☐ Catalogue the existing file name and location
  - ☐ Move file to the document server directory
  - ☐ Copy file to the document server directory
- Buttons: OK, Cancel

***Modification as at release 06.00.07***

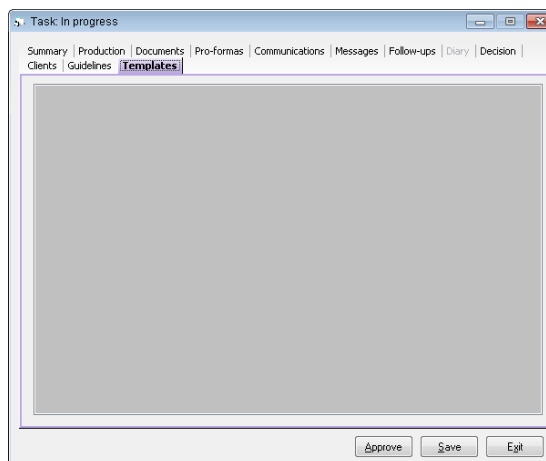
- ✚ Added a warning check box to matter type and task types. This can be used to warn users when they are operating on matters that require a budget amount. When users are working on a task, that is they load the task on the edit form, they will be warned if the matter type or the particular task type that are editing is set to check the existence of budgets. Please note that this is just a warning and the user can continue on working on the task.
- ✚ The “Actual Fee Raised” time-cost report was always using the current rate for the user. This is changed so that it will use the historical user rates if they exist in the database.
- ✚ The create workflow image will now add the milestone percentages for each task. Also the fill colour for tasks that have milestone have been changed to yellow for easy identification.

**Modification as at release 06.00.06**

- ✚ Mail merge fields are now extended to include the name of the person responsible as well as the Department/Partner name.



- ✚ Added ability to store templates (communication, message and document) against the tasks of a master matter. When a matter is created from the master, these templates gets copied to the new matter and then the users can use them to create communication, message or import documents. When importing documents, if the template contains importation directories, then the documents in those directories will be imported (and moved) and attached to the task. This process is similar to advance import process from the document control centre with the exception that the matter specification will be ignored. The pending status of the document will be removed after the successful importation. The user will have a choice of finalising these imported documents.



- ✚ There was a bug in the advance import document. The system would have crashed when the number of sub-directories was more than the import specification specified in the template. Synergy will ignore the extra sub-directories names, that is, if the template contains two levels for directory specification but the folder in the file system has 3 nested directories, the third directory name will not be parsed as there is no specification specified in the template for that sub-directory.
- ✚ When a client was linked to another client as address source, when the address of the address source changes, Synergy will carry the changes to all of the address dependents. The home phone number of the address source was also meant to be



synchronised. However, the synchronisation of address source to address dependents was resetting the home phone number to blanks. This is fixed now.



Allowed two new external accounting systems to be linked to Synergy called “Trust” and “Other Accounting” systems. These systems can be any of the supported accounting systems such as Dynamics, Jiwa, Vision or QuickBooks. Please note that you cannot set up the same database for accounting, client accounting and trust accounting. Each system must have its own database. Please also note clients will be created as creditors in the two new systems (trust and client accounting). These two systems can be renamed from the house keeping. As these names are used for tab captions and check box texts, please use a reasonably short name for these systems. Also allowed the accounting systems, debtor and creditors to be renamed in Synergy. This can be done when defining the link to the accounting system.



Creditor and debtor tabs on client edit form now has a tab control that displays information from accounting, trust and other accounting systems if these systems are linked to Synergy. Please note that these tabs will only be visible for if these accounting systems are of specific type. For instance, if the linked systems are QuickBooks systems, then these tabs will be invisible. However, if these systems are Sybiz vision, tabs will be visible. There is also a separate billing debtor stored for each one of the new accounting systems. Please ensure that you test this version thoroughly on a test environment before installing it in your live system as there have been extensive changes to the accounting integration.

- Added ability to create multiple matters from the same master in matter templates. Housekeeper can set up the frequency, starting day and month and number of matters that should be created. At the actual creation time, the user is prompted to ensure that these settings are still valid. User can change this setting to whatever is required and then create the matters. Prompting user will give extreme flexibility and reduced configuration time in terms of number of masters and templates that need to be configured to cater for various configurations.

- We have made the follow-up amount available for non-recurring follow-ups.

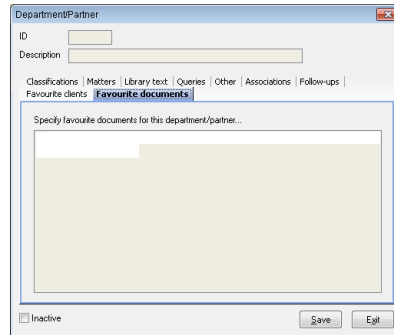
- When cloning a user, determining the type of the selected client was not working properly. This problem is resolved now. We have also changed Synergy to delete the newly cloned user when exit button is clicked on the user form. The deletion of the cloned user was failing in some instances depending on what types of attributes were being attached to the cloned user. We have made every effort to rectify this problem. However, if you find that the cloned users are not being deleted after clicking exit button on the user form, please let us know and we will investigate it further.

- Following changes were made to workflow answers:

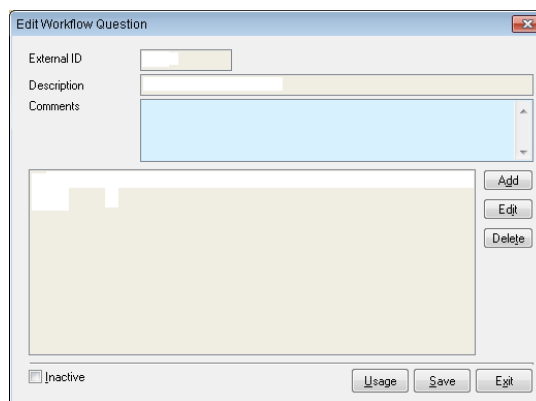
- Versions prior to 05.00.06 only allowed matter related profiles to be added to the decision based processing. From this version, we have added the ability to create client related profiles when decisions are made.
- Added ability to create multiple follow-ups when decisions are made. These follow-ups could either be task or client related follow-ups and this can be nominated when configuring the decision.
- This version allows client related additional data to be captured from a decision. Please note that the additional data must be linked to the type of client if it is client related before the data is captured. If the additional data is not linked to the client type, Synergy will continue the process without capturing the additional data. Similarly for matter types. The matter type must be linked to the additional data. If it matter type is not linked to the additional data type, Synergy will continue the process without capturing the additional data.

- Users can now set up decisions to capture client associations. You need to specify an association category when mapping a decision on a task. When decision is made a form will allow users to create any necessary client association before continuing with the rest of the process.

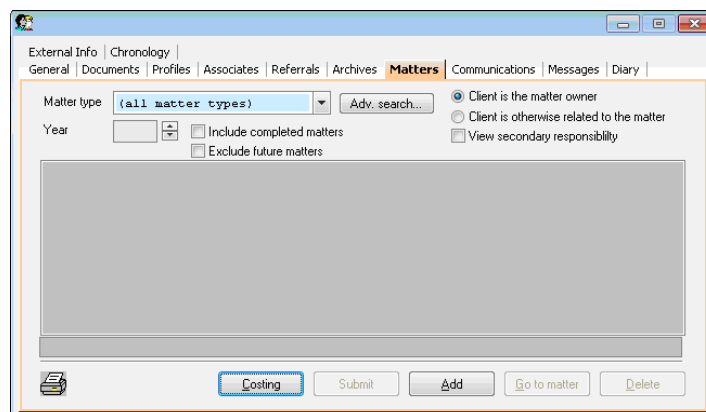
- ⊕ This version allows favourite documents to be stored for each department. These documents are displayed in addition to those of individual users on favourite document lists. Please note that users cannot delete this from their favourite documents. The only way to delete these is to remove them from the department all together.



- ⊕ Added ability to view the master matters and tasks that are linked to a question. This can be done when a question is being modified using the “Usage” button. The master matter and task details linked to any answer within the modified question will be displayed.



- ⊕ Added a check box to the Client Control Centre (matters tab), Workcentre (matters and tasks tabs), Task Search and Matter search forms that allows users to exclude future matters. We have added a new option in the company defaults (under matters section in the Misc tab) that allows sites to set appropriate default. To keep the same behaviour as previous version, this option is off by default, that is, all matters will be displayed.





In the costing form (the form that gets displayed when costing button is clicked from matters tab of the CCC), the time and disbursement budgets are displayed for the selected billing period. If no billing period is selected, the total budget for all of the non-finalised (in progress and completed under review) matters is displayed.

Total unbilled time:	\$0.00	Total billed time:	\$0.00
Total unbilled disbursements:	\$0.00	Total billed disbursements:	\$0.00
Total unbilled write off:	\$0.00	Total billed write off:	\$0.00



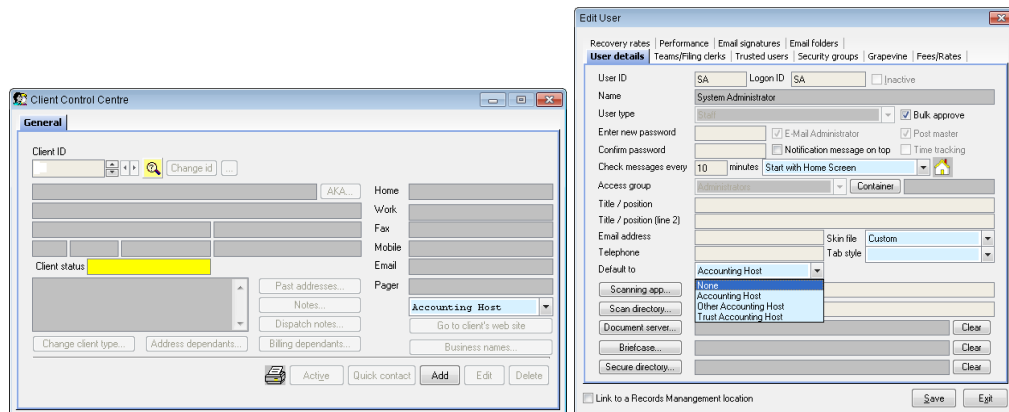
Current version of Synergy allows automatic association of related clients when matters are created. However, to determine the related clients, Synergy ensures that both associates' roles in the association are within the same association category. In some cases, it could be useful to only ensure that associate's role is with the association category. We have introduced a new setting at the Housekeeping (Matters tab) called **"Enforce both sides of associations to be within the same category"** that allows you to relax this rule. This option is on by default to preserve the current behaviour.

Task sequence name: Year  
Task sequence starting number: 2006  
Target date default days hence: 0  
Use business days for calculation: ☒  
Enforce entry of target date: ☒  
Enforce entry of approval date: ☒  
Automatically copy associations: ☒  
Enforce both sides of associations to be within the same category: ☒  
Importation task limit: 30  
Matter name: Matter  
Singular form: Matters  
Plural form: Matters  
Progress description: Progress  
Singular form: Progress  
Plural form: Progress  
Matter deletion and master matter creation security level: 3

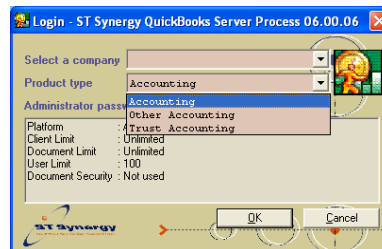


Given that we can now link three accounting systems to Synergy, we have added a dropdown combo box to the Client Control Centre that allows users to extract information from any of these linked systems. Please note that when you select a different system from this dropdown, the Sales/Purchases tab (Debtor/Creditor tabs) is populated with the information from the selected system if the client is linked to that system. In order to accommodate for this dropdown, the **"More information"** button is now located next to the **"Change id..."** button. The default for this dropdown is set to accounting system as this would have been the behaviour of the system

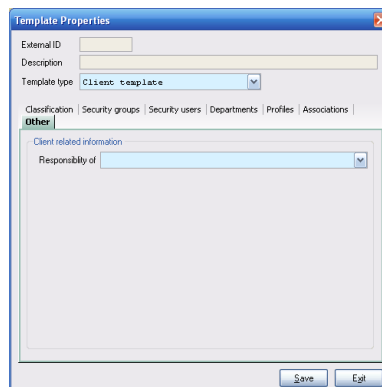
in the previous version. However, this can be customised for each user. It can be set to none which means by default the tabs will be invisible.



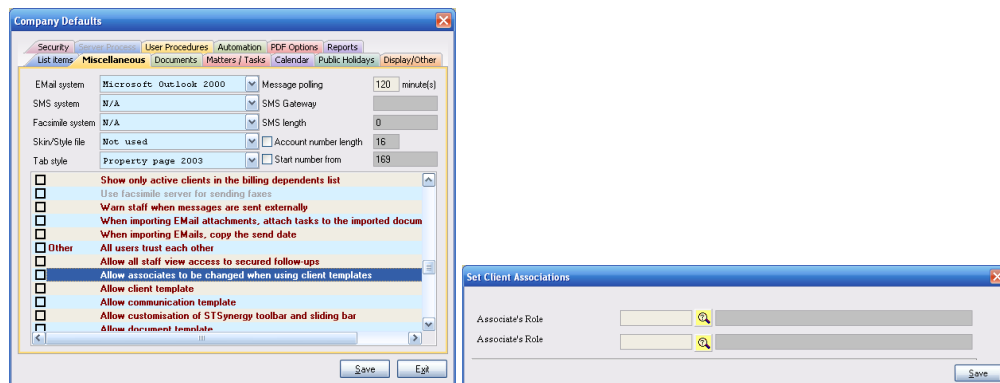
- Changed the QuickBooks server to allow connection to the three different accounting system.



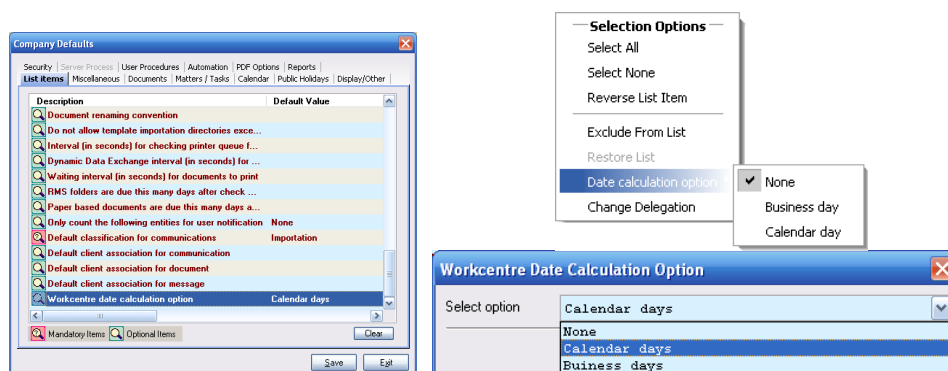
- Added TBillTo and OBillTo to the ZZSYNCLI table. Added ODebtor, TDebtor, OCreditor and TCreditor to ZZSYNDET table. The first two fields are the equivalent of the BillTo for the two new (other, trust) accounting systems. The other 4 are the equivalent of DebtorID and CreditorID (respectively) for the two new (other, trust) accounting systems. These fields are treated identically to BillTo, DebtorID and CreditorID respectively.
- Added ability to store person responsible against a client template. The person selected within the template will be set as the person responsible if the client template is used. Also, the department stored against the client template will be used to select the department for the client. Please note that this will only be done when selecting client template for adding new clients.



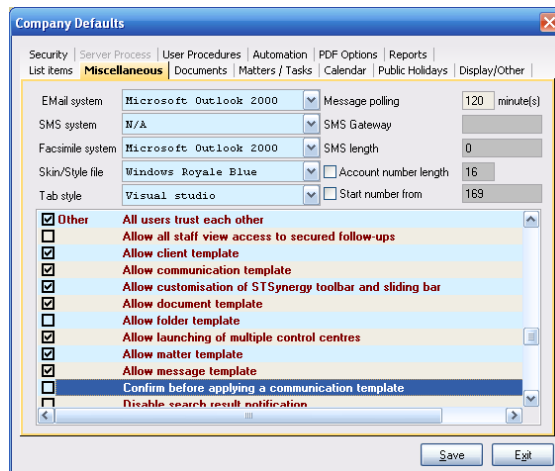
We have also added an option to the housekeeping that allows users to change the associates when client templates are used. The default for this option is off to keep the existing behaviour of the system. When this option is turned on the user is prompted with a form that allows him/her to select new associates. Please note that you cannot exit from this form without saving the required associates. If you leave any of the associates blank, the system will reset it back to the associates set in the client template.



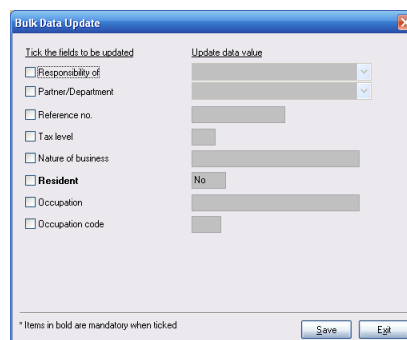
- Added a new option to the company default that allows system administrator to specify whether business day calculation should be used on the workcentre (tasks tab). This will improve the performance when these calculations are not required. To keep the existing behaviour, the default is set to use business day calculation. However, you can change it to “Calendar days” or “None”. Calendar day option will give you the elapsed and to target in terms of calendar days rather than business days. If you select “None” no calculation will be done. After this change, a new menu option has been added to the task list’s pop-up menu in the workcentre that allows you to overwrite the default setting. By default, when the form is loaded for the first time, it will use the default setting for display. However, once the form is loaded, the user can change this option using the menu items. Please note that when the workcentre form is closed, this option will go back to the default value set at the housekeeping.



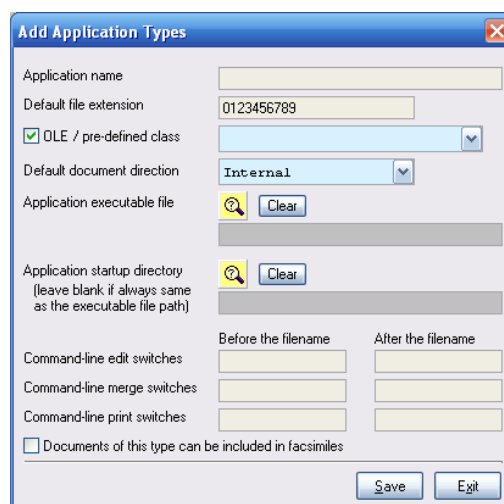
- When a user types in the external identifier of a communication template in communication form, Synergy will ask for confirmation before applying the template. We have added an option in the housekeeping that allows this confirmation to be turned off.



- Added ability to update person responsible as well as the Partner/Department for bulk update from CGE.



- Some applications create files with extension longer than 3 characters. This version of Synergy allows 10 characters to be stored as the file extension against an application.



- Allowed document direction to be stored within templates.



### *Modification as at release 06.00.05c*

- ✚ In version 06.00.05b we allowed related clients of a matter to be changed when creating them. In some cases, an organisation may not want this flexibility and may want all their staff to add all of the related clients set at the housekeeping to be added. In this version, we have added a new setting to the housekeeping that allows this feature to be turned off and consequently, add all of the related clients as before.
  - ✚ There was a bug in processing meta-data of a document when it was being imported. It was not processing the filing classification properly and consequently, the matters were not being created. This should be fixed now.
  - ✚ In a workflow task, the users can specify a list of answers that will terminate the looping when a decision is made. This was not working in the previous versions; that is; a user could not add an answer to the list. This should be fixed now.
  - ✚ “**Import document**” button moved from data transfer tab to the support tab and renamed to “**Import data**”. This button now allows a lot more to be copied from another synergy database. The source and target databases must have the same version number for the copy to work. With this facility, it is now easy to copy configuration data from one database to another database. The matching between the two databases is done based on external identifiers of the data when the table contains an external identifier column and the description when table does not contain external identifier. This facility will be expanded in the future as required to make creation of new databases from an existing ones easy. Where this could be used is when a site is being implemented for the first time. A test database can be established and most configuration data can be set and examined in the test environment. Once the users are happy with the configuration, those entries that should be copied to the production version can be copied directly from this database.
  - ✚ Added a cut and Paste option to the popup menu on the task tab of the Matter Control Centre. This will allow tasks in an unapproved master matter to be moved around. Please take extreme care and check your changes after the cut and paste to ensure that the finished workflow is exactly what you want. The moving of tasks will work perfectly in sequential tasks. However, in the presence of concurrent tasks, where a task ends up is dependent on the position of its unique task identifier relative to other tasks under that branch. Users could also use drag and drop to achieve the same result as cut and paste. A new security group is added to the housekeeping to specify those that can perform this operation. Please note that the following conditions has to be met before this facility is made enabled:
    - The logged user must be in the security group.
    - Matter must be a master matter.
    - Master matter has to be active.
    - If master matter has decision nodes, there should not be any matter created from the selected master.
- Two rules govern which tasks can be moved.
- A user cannot move a parent task to be a child node of any of its children.
  - A user cannot move a task with a higher internal task identifier to be the parent of a task with lower internal task identifier. Synergy will stop the cut and paste operation if the user tries to do any of these moves.

***Modification as at release 06.00.05b***

- ✚ Fixed a bug in pop up menu. In some cases selecting items after the “Remove Selected Items” were not working. This should be fixed now.
- ✚ Added the percentage complete, time budget and budget achieved figures to the general tab of the MCC.
- ✚ A few versions back, Synergy provided a facility to automatically add related clients based on certain association category set at the housekeeping, master matter or matter type levels. In most cases, all of the associations are needed to be linked to the matter when a matter gets created. However, in some cases, one may not require all of the associates in the given association category to be linked. In these cases, the users have to complete the creation of the matter, go to the MCC, click on the related client tab and remove those clients that are not needed. To make this process easy, a new tab is added to the matter edit form. This tab contains all of the clients that will automatically be linked to the matter when it is created. By default all of the clients in the related client list are selected. However, the user has the option of deselecting those that do not need to be linked. For this tab to be visible; the matter must be a normal (non-master) matter with a client that has at least one associate within the relevant association category.

***Modification as at release 06.00.05a***

- ✚ The message creation form was crashing the system when using the right mouse button to do spell check when sending faxes. This is fixed now.
- ✚ The client synchronisation program was producing an error at the end of the process when it was creating a message. This is fixed now.
- ✚ The fax server was not sending faxes as it was trying to access one of the dropped columns of the ZZMESSAG table. This is fixed now.
- ✚ A new report called Matter Progress Report has been added to the time cost reports. Please copy “ZZMATPRG.RPT” from the CD to your system directory.
- ✚ Fixed a bug in the GL mapping form. It was unable to determine duplicate combinations.

***Modification as at release 06.00.05***

- ✚ Allowed a filing category to be stored against the matter types. This filing category is used for selecting filing classification for documents created from within a matter.
- ✚ Added default client association category to the housekeeping for documents, messages and communication. These are used for selecting associates when documents, communications and messages are created.
- ✚ Allowed tasks to be defined as milestone tasks. When a milestone task is defined, the user can enter the percentage of the total matter for that task. Please note that when you define a decision node as a milestone, the milestone details are copied only once per decision and task. If you have defined recursive workflow and a decision node is replicated twice, the second replica will not carry any milestone details.

## Modification as at release 06.00.04

- Messages in Synergy carry a flag indicating the urgency of the message. In systems like Exchange/Outlook, the importance can be set to “Low”, “Normal” or “High” and used to prioritised outgoing messages. We have removed the “Urgent” flag and replaced it with an importance level with the above mentioned levels. If you have any stored queries or Crystal Reports that are relying on this column within “ZZMESSAG” table, you will need to amend them to use the newly added column “MsgImprt”. This field will contain 0, 1 or 2 for “Low”, “Normal” or “High” importance respectively.
- We have changed the email creation form to use the new importance levels and the new tab control. Also made the images on the buttons to have transparent background.

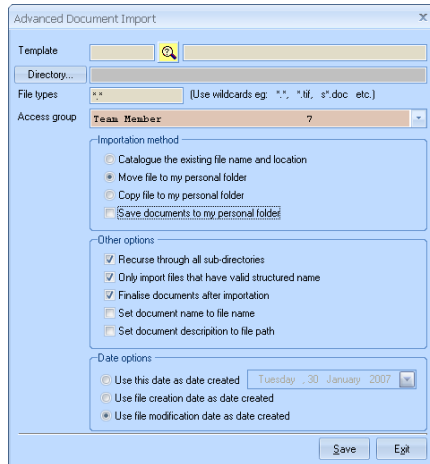
- We have also added the message importance to the message templates. This will be considered when that template is used for creation of a message.

- Fixed the communication form. In non-modal invocation (e.g. from Workcentre), notify, save and exit buttons were being hidden under the tab control. This is fixed on this version.

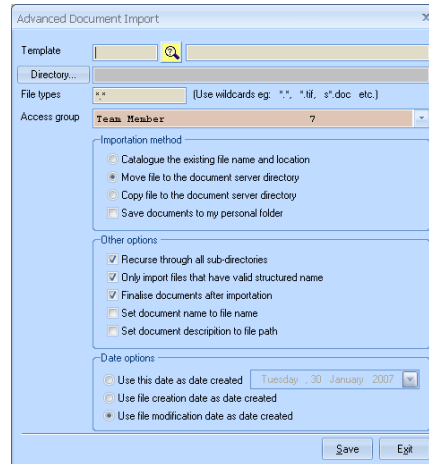
Before correction

After correction

- The description of the option buttons in advance document import was not consistent with the “**Save documents to my personal folder**” check box. The form worked correctly but the descriptions were misleading. When the check box was ticked, the description of the copy and move buttons was indicating that the files would be copied to the user’s personal folder.

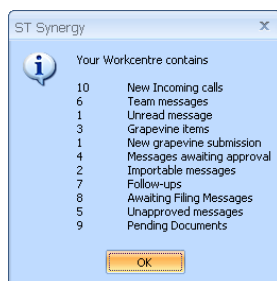


Before correction

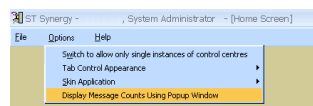


After correction

- We discovered that in some rare cases when using “**Advance Import**” form, the last specification in the list of specifications was not being considered. This was noticed when we configured a specification of the form “{ }\_{[PC(16)]}” and the actual director name was constructed as “**ClientName\_AccountNo**”. In this instance, the account number was not being looked at and the documents were not being linked to the client. This is fixed on this version.
- The fax to clients form from the document tab of the Matter Control Centre was not checking the documents to see if they are allowed to be faxed. This validation has been added to the form. The user will be notified through a message box and will be forced to remove the non-faxable documents before the process continues.
- Synergy allows users to specify the interval where various entities are counted and reported by way of a message box. However, some users may find this intrusive where every so often they have to click the OK button to dismiss this message box. In this version, we have allowed uses to convert this message box to a popup menu similar to MSN pop-up menu that gets displayed on top of the task bar. Please note that this option is not stored at the database level. It is only active while the application is running. You can turn this option on from the “**Options**” menu. This pop-up menu will only be closed when the user clicks either the synergy or the close icon.



Current Message box



Options menu item



Message count in pop-up style

- Added a new list box to the Email/Fax client from that gets loaded from the documents tab of the Matter Control Centre. The new list box allows users to include common documents that must be included in all messages/faxes. The only rule that is

validated against the entries in the new list is that they all have to be digital documents (and defined as faxable if the user is faxing documents).

- Added ability to clone a user. This can be done from the security tab of the housekeeping or from client edit form. We have added a new combo box to the other tab of the client edit form that enables selection of a user for cloning. If no user is selected from this combo box, a blank record will be created and the user has to fill the properties as needed. However, if a selection is made from this combo box, that record will be duplicated and linked to the client record being added/modified. Not all properties are copied. For example, some timecost information will not be copied.

- Added a check box “Disable workflow approval rules” to document templates that allows users to disable the approval of the workflow items during the import/dispatch and advance import process (Mail Dispatch Centre and advanced import from Housekeeping/DCC). The workflow rules are as follows for those template that contain matter numbers in the importation specification:

- Matter must exist in Synergy and have at least one task.
- From mail dispatch centre, Synergy will check for an active task first. If it cannot find an active task, it will check for on hold task.
- If Synergy cannot find an active or on hold task, if the template disables the workflow approval rules, Synergy will try to locate the last task (the task with the maximum primary key) for the matter.
- If the above look ups results in locating a task, then that task will be linked to the imported document.
- Tasks will not be approved if workflow approval rules are disabled from the template.
- The document pending flag will remain in the following cases when:
  - the client identifier on the file specification is invalid.
  - the document does not have any classification.
  - the document does not have any clients.
  - the document cannot be finalised.
  - the document cannot be dispatched.
  - the disable workflow approval rules check box is on and document is not attached to any tasks.
  - the disable workflow approval check box is off and document is not attached to any tasks or the tasks could not all be approved.

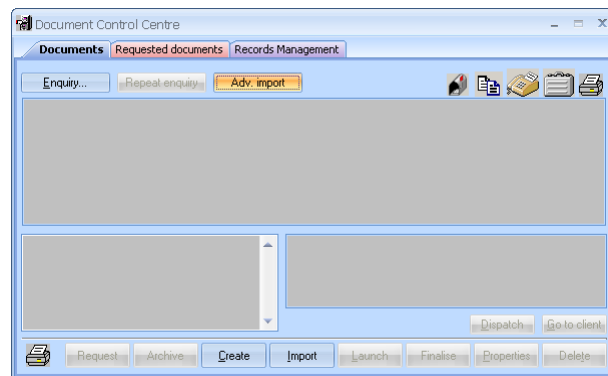
- When historical account numbers were being entered in the CCC, some of the buttons were not being set up as bolded even though there were entries for them. For instance, the business names button remained with normal text even though there were some business names for the client. The CCC is now considers the historical account numbers in setting up the buttons in the general tab.

- ✦ When forwarding messages, the message importance was always set as normal. We have changed this behaviour. Forwarded messages take the importance of the original message. The user can still change it to whatever is required.



### *Modification as at release 06.00.03*

- ✚ Synergy was failing to import documents from a message attachment if the user selected a template that contained some of the classification or clients that were attached to the message. This does happen rarely as not many templates would have clients or have the same classification as a message. Nevertheless, this error is fixed now.
- ✚ When sending messages in the Workcentre outbox, Synergy usually displays a message informing the user of the result of the send operation. This message is now suppressed when sending multiple messages from the Workcentre outbox and only a summary of the process is displayed at the completion of the process.
- ✚ When deleting the additional data columns from the housekeeping, it seems like the column is not deleted and no error message is displayed. However, when you exit the additional data form and go back to it again, you will see that the actual column is deleted. This bug will only occur if there are additional data rows that are not linked to any client or matter. Synergy tries to remove the row from the table but the database constraints on the virtual tables do not allow its removal. Synergy now deletes all of the additional data records from the virtual tables for the orphan rows before attempting to delete the row itself.
- ✚ Added the advanced document importation facility from the Document Control Centre similar to that from housekeeping. Also added a check box to this form that allows users to store the path of the imported document into the description field. This could come handy especially during the implementation phase of a site where the document path includes some useful information. This check box will only be available when this feature is invoked from the Housekeeping or the Document Control Centre. When invoked from “**Adv. Import**” button of the MCC (documents tab), this feature is disabled. We have added a new security group to the “Security” tab of the company default form to control who has access to this feature from DCC. If this security group is not set from the company defaults form, nobody will have access to this feature.



- ✚ When the users are searching the database using “**New query**” button from the Client Group Enquiry, the start and end date for checking the next follow-up date is restricted to be in the same year. On this release we have removed this restriction. So now, you can enter any date range provided that the start date precedes the end date.



We have added a new feature to enable users to secure creation, modification and deletion of the matters to a security group. These security groups can be added to each matter type. Please note that the deletion security group will only be checked if you try to delete a matter interactively through the interface. For example, when a user creates a matter, s/he has the option of exiting from the matter edit form. If the user selects to exit the matter edit form, Synergy will automatically attempt to delete the newly created matter. In this instance, the deletion security group has no effect. Similarly, when users select the transfer button from the Matter Control Centre, if the transfer is not completed successfully, the newly created matter will be deleted by Synergy without checking the deletion security group. If users are members of a team and the team is included in the particular security group, then all of the team members will also have access to do the required process for that matter type.



In the previous versions, the delete button was disabled from the task tab of the Matter Control Centre even if there were no tasks attached to the matter. The user had to click on the “**General**” tab and delete the matter from there. From this version, we have allowed matters to be deleted from the task tab. Clicking the delete button when a matter is highlighted will behave the same as clicking the delete button from the “**General**” tab, all deletion rules will be checked before the matter is deleted. Once the matter is successfully deleted, the form will be reset to a blank form and the “**General**” tab will be displayed. This button will only be enabled, if there are not tasks attached to the matter.



### **Modification as at release 06.00.02**

- Those customers that are linking Synergy with Vision accounting system can now create a job in Vision when they are creating matters in Synergy. This can be achieved by turning the “**Add matters to accounting system**” check box on from the housekeeping for the required matter types. Please note that master matters will not be added to Vision. Please also note that the matter will only be added to Vision if the primary client of the matter is defined as a debtor in Synergy. We only set up the following fields for the jobs:

Job number: This would be set to the matter number,  
Title: This would be set to the matter description,  
Customer: This would be set to the primary client of the matter,  
Start date: This would be set to the creation date of the matter,  
Notes: This would be set to the Matter notes (not the production notes),  
Ledge number: Will be set to job

When updates are done to the matter, any updates to these fields will be reflected on the Vision if the job is still in Vision.

- As a result of linking matters to the jobs in Vision, we have added a new button to the data transfer tab of the housekeeping that allows users to import the Vision jobs into Synergy. The same rules apply when the jobs are imported. The job must be linked to a customer in Vision and the customer must exist in Synergy as a debtor. When importing, if the job has a completion date (regardless of what that date is whether in the past or the future) the created matter will be approved automatically.
- We have also added a new tab called “**Accounting**” to the Matter Control Centre that displays some accounting information from the Vision accounting system. Please note that this tab will only be visible if Synergy is linked to Sybiz Vision and the matter that is loaded in the MCC is linked to a job in that system.
- Added a text box to the clients tab of the document properties form that allows users to enter a client’s account number. Pressing enter key while the cursor is in the account number field will add the client to the primary client list if a valid account number is entered.

Document Properties (d1111311)

Security Addresssee Pro-formas Guidelines  
Identification Classification **Clients** Key words Misc. Preview Replace Tasks

Primary clients to whom this document is addressed... Account no.

Add

Add. Src

Assocs

Delete

Clear

Ext. Src

Down

Up

Other clients to whom this document relates...

Add

Assocs

Delete

Clear

Ext. Src

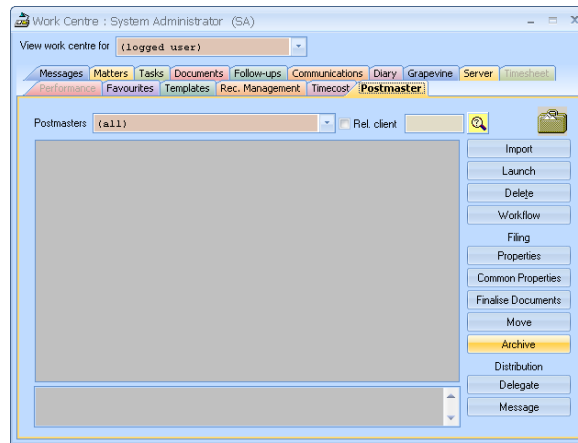
☒ Pending allocation by postmaster

Save Exit

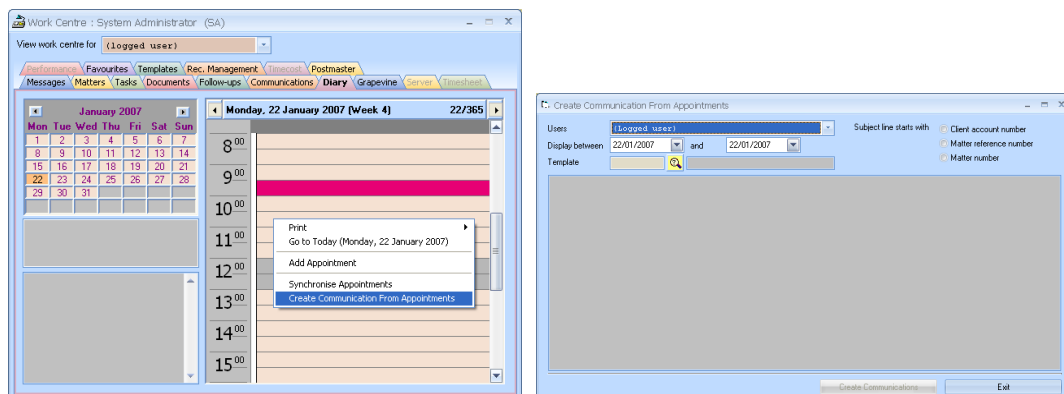
- Added ability to send multiple messages from Outbox in the WC. The user has to confirm before all selected messages are sent. If no entry is selected (ticked), the highlighted entry will be sent without a need for confirmation which is the exact behaviour as the previous versions. Please note that when you select a single message; clicking send will send the selected message rather than the highlighted message. The highlighted message will only be sent if you have not selected (ticked)

any items from the list. In case of multiple sends, the message that gets displayed at the end of each send is suppressed and a summary of the process is displayed at the completion of the process.

- Added an archive button to the “**Postmaster**” tab of the Workcentre. Using this button, users can place paper based documents into an RMS folder. Please note that only those documents that have the paper base flag set will be processed.



- We have added a new feature that allows users to create communications from their outlook Diary appointments where the communication notes are stored in the appointment notes. This will be useful for the sites where their users use PDA and push their appointment notes to their Exchange server from PDA. Please note that the subject of the appointment must start with the matter number, matter reference number or the client account number. These attributes should not contain any spaces since space is used as the delimiter. The user can indicate which one of these is stored in the subject line at the time of creation.



- Added 3 new predefined Windows Vista skins (blue, black and silver).
- In the previous versions, Synergy was ignoring any errors returned from Outlook and was considering the message as sent. From this version onwards, the message will be considered unsent until Outlook successfully sends the message.
- Fixed a bug in the Briefcase Control Centre. It was not allowing checking in documents if the document renaming convention was not in use.
- Added the Department name to the “More Information” form that can be loaded from Client Control Centre.
- Importation of Debtors and creditors were not checking for blank account numbers and it was assuming that accounting system will always enforce having an account number. However, it became clear that in some accounting systems (e.g. Sybiz

Vision) the users can leave the account number blank. Synergy will now generate an account number for all those debtors or creditors that have a blank account number.

- ⊕ The back and forward button in the Client Control Centre was working incorrectly. The left button was moving to the next client in the list rather than the previous client. In this version, when you load a client into CCC or a Matter into MCC, the client or matter is always added to the end of the list. If the client or matter already exists in the list, it will be deleted from the list first and then it will be added to the end of the list.

- ⊕ When the scanning form is invoked from the postmaster tab of the Workcentre, a user can create a workflow by pressing the “**Process**” button. After this, the replicate check box becomes visible and allows users to create extra workflow for the same set of documents. However, if the user does not click the replicate check box and press the “**Process**” button again, the documents will be attached to either the newly created or an existing matter and they will be detached from the previous matter. This generally is not the desired effect. To avoid this danger, when the scanning form is invoked from the “**Postmaster**” tab, the “**Process**” button will be displayed. However, once the initial processing is completed, Synergy will automatically click the replicate button and thereafter, the user can only use the “**Replicate**” button.

- ⊕ We have added a new option in the housekeeping that allows the scanning form to be closed after a single processing of the documents when invoked from the “**Postmaster**” tab of the Workcentre. That is, the user will not be allowed to replicate the selected document to other workflow items. This setting is off by default allowing the system to work as it was in the previous version.

- ⊕ When a decision node was being approved, Synergy was setting the creation and target dates of all of the sub-tasks underneath the decision task regardless of whether they were the top level tasks or they were many levels down. This is changed so that an only top level task, that is tasks directly under the approved task, will have a creation and target date. All other tasks will have a null creation and target date. These tasks will have their creation and target date set when their parents are approved.

### *Modification as at release 06.00.01a*

- ⊕ This version has two new features for QuickBooks invoice creation function from follow-ups. In the past, the invoice dates in QuickBooks were set to the current date on the database server. We have added a date field that allows users to change this date to any future date they may want. Also, in many cases the follow-up amounts may be reviewed and changed. In these cases, there was no easy way of updating these amounts before running the invoice creation routine. We have added a new button that allows users to update the amount before creating invoices.

The screenshot shows a Windows-style dialog box titled "Create QuickBooks Invoices From Follow-ups". It contains several sections: "GL/Service code" with a dropdown menu; "Broad client types" and "Base types" with dropdown menus; "Follow-up category" with a dropdown menu; "Type" with a dropdown menu; "Follow-up date" with two date pickers (both set to 12/12/2006) and an "and" button; "Invoice date" with a date picker (set to 12/12/2006); "Activity status" with a dropdown menu; and a table with columns "External ID" and "Description". Below the table are five buttons: "Update Amount", "Summary", "Export", "Invoice", and "Exit".

- ⊕ The scanning form is modified to allow selection of related clients all the time. This would be useful in cases where you are scanning many documents for the same set of related clients. In the past, the related clients had to be selected in the document properties form. However, now, the user can select the related clients once and keep scanning (with/without creating workflow) for the same list of related clients. In the previous versions, it was not possible to use replicate button when invoking the workflow form from the postmaster tab of the workcentre. This feature is now made available.

The screenshot shows a Windows-style dialog box titled "Create Workflow". It contains several sections: "Document options" with a "Template" dropdown and "Locate" button; "Primary client options" with a checked "Attach to an existing client" checkbox and a "Client ID" field; "Related clients" with an "Automatically relate associates" checkbox and a "Related client ID" field; "Matter options" with "Attach to an existing matter" and "Create a new matter" checkboxes; "Primary profile" with a dropdown menu; "Additional profiles" with a table with columns "External ID", "Description", and "Status"; "Other options" with "Send Email" and "Notes..." checkboxes; and "Archive in" checkbox. At the bottom are "Process" and "Exit" buttons.

- ✚ Added an extra column to the list view in the miscellaneous tab of the company defaults form. This column describes the type of setting (i.e. Client related, document related etc). This list is now sorted in alphabetical order of their description. Only those options that are dependent on each other will be listed where appropriate (might be out of order). For example, you can see that under the documents options, **“Lock document revisions”** is before **“Keep track of unprinted document in batch mode”** because this option is linked and dependent on **“Include document versioning”** which comes alphabetically before **“Keep track of unprinted document in batch mode”**.
- ✚ Added a new configuration option to the company defaults that allows site to enable users to dispatch a document from the task form to any of its primary clients. The previous versions would only allow dispatching in the task form if the primary client of the matter is a primary client of the document. Please note that the button will be disabled if the selected document has been despatched to all its primary clients.
- ✚ Added clear button for the briefcase and secured directory in the user edit form.
- ✚ Changed the caption of the buttons on the appointment edit form on the attendee tab to “Add” and “Delete” which is more descriptive.
- ✚ In the previous version of Synergy, the common properties were blindly copying the digital and paper based flags. This was not quite correct as converting a non-digital document to a digital document requires a file to be located and copied to the document server. From this version onward, common properties will only add the archiving information to the other documents.



### *Modification as at release 06.00.01*

- ✚ Added an option, “**Validate time cost against budget when approving**”, to the company defaults that allows sites to specify whether the validation of time cost amounts against the budget is done at the entry or approval time. When this setting is turned on, users can create any entry and the setting “**Warn when total time cost exceed budgeted amount**” would be used during the approval process. When this setting is off (default), the system will validate the entries as they entered into the system.
- ✚ Added an option, “**Prevent processing entries if budget is not set**”, to the company defaults that allows sites to specify what Synergy should do if there is no budget set for a matter. If this option is turned on, there must be a budget set at the matter level before the entry is accepted. If this option is turned off (default), the data can be saved regardless of budget details. The “**Validate time cost against budget when approving**” option determines when this check is done, at the data entry or approval.
- ✚ Added an option, “**Validate total time cost against budget using the time cost entry categories**”, to the company defaults that allows sites to specify that budgets is set at the time cost entry categories. This setting is only applied to disbursements at this stage. Future releases may include time entries as part of this process. The “**Validate time cost against budget when approving**” option determines when this check is done, at the data entry or approval.
- ✚ Added an option, “**Validate total time cost against budget using the time cost entry types**”, to the company defaults that allows sites to specify that budgets is set at the time cost entry types. This setting is only applied to disbursements at this stage. Future releases may include time entries as part of this process. The “**Validate time cost against budget when approving**” option determines when this check is done, at the data entry or approval.
- ✚ The disbursement form now displays the approver and the approval date of the disbursement if it is approved.
- ✚ One of the disbursement printing options (print selected) from the time cost tab of the workcentre was closing the reporting database object hence causing errors afterwards when the user wanted to view any other report. This is fixed now.
- ✚ Added a new menu option “**View Budget**” to the pop-up menu for disbursements in the time cost tab of the workcentre. This allows users to view and adjust the currently selected matter’s disbursement budget. Also enabled the “Print” option for this menu for approved items regardless of whether there is an entry in the list or not. When printing the approved disbursements, a new option allows the users to convert and import the report in PDF format into ST Synergy. This option will only be available if the PDF conversion options are set up from the company defaults.
- ✚ Added three new setting for each user in the Fees/Rates tab as follows:
  - 1) Display From: This entry allows System Administrator to specify a minimum amount. This figure will be used when displaying the disbursement entries for approvals in the time cost tab of the workcentre. This setting is only applied to disbursements at this stage. Future releases may include time entries as part of this process.
  - 2) Max per entry: This entry allows System Administrator to specify the maximum limit for each individual time cost entry. Once this is entered, the user cannot add any time cost entry greater than this value. This setting is only applied to disbursements at this stage. Future releases may include time entries as part of this process.
  - 3) Approval Limit: This entry allows System Administrator to specify the maximum amount that a user can approve per matter. Once this is entered, the users total time cost approval cannot exceed this value. This setting is only applied to disbursements at this stage. Future releases may include time entries as part of this process. This setting will also consider the

Fro all of the above three options, “**Validate time cost against budget when approving**” determines if this validation is carried out at the entry or approval stage. Also the above two options (“**Validate total time cost against budget using the time cost entry categories**”, “**Validate total time cost against budget using the time cost entry types**”) determines whether the limits are applied at the entry category level, entry type level or the entire matter.

- ✚ In many cases, the matter budget review may not cause any change to the actual budget. However, it might be important to record the fact that the budget has been reviewed on a specific date and time. The disbursement and time budget tabs have been changed as follows:

- 1) The description field is now enabled if there is a budget entry in the list.
- 2) If the user enters anything in the description field, then a record is added to the budget history table.

- ✚ Allowed property and prospect type clients to have billing debtors. Please note that they cannot be set as a debtor within an accounting system but you can link a debtor to them as a billing debtor.

- ✚ Added a create button to the time tab of the invoice form. This button will only be visible if the user has the time tracking enabled and is a reviewer. This button allows creation of time entries on the fly when creating invoices. The created entry will be approved automatically after the creation and then the user can select the entry for inclusion into the invoice. Please note that all of the time cost validation will be carried out as per normal both at the creation and approval stages.

- ✚ Added a new menu option to the disbursement budget and time budget list that allows looking at a summary of the budget at the top tier level. When selected, this will summaries the entries in the list box for each top tier and display it in a new form.

- ✚ Added a check box to the follow-up tab of the workcentre that allows all of the team based follow-ups to be included in the list. The security of follow-up has also been extended to included members of teams, that is, team members can now view and action their team related follow-ups.

- ✚ Hold reasons can now have default number of days. Because of this change, we have moved the hold reason drop down in the “Put Task On Hold” form to the top. This will allow users to select a hold reason, which then automatically sets the number of days from the selected entry.

- ✚ Added an option “**Display the tasks to the user when delegating**” to company defaults that allows users to look at the tasks being delegated before delegating them. This option will only be available if “**When approving a task, allow addition of the delegation to active sub-tasks**” option is turned on. This option is turned off by default allowing Synergy to work as before.

- ✚ Added an option “**Bypass addition of the delegation to active sub-task when sub-task has a delegation**” to company defaults that allows users to avoid creating a delegation if a delegation already exists on the newly activated task. This option will only be available if “**When approving a task, allow addition of the delegation to active sub-tasks**” option is turned on. This option is turned off by default allowing Synergy to work as before.

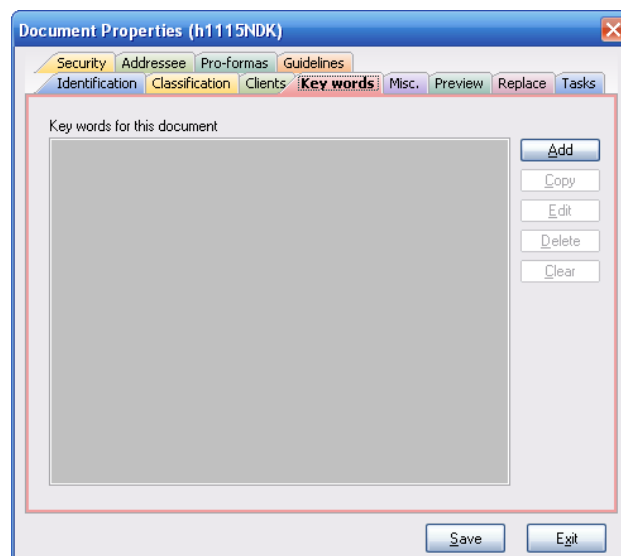
- ✚ When sending faxes using “**Fax clients**” button from the documents tab of the matter control centre, sometimes having nulls in the database fields were causing Synergy to assume that fax number did not exist. Synergy has changed to convert nulls to spaces before examining the fax number. This should allow Synergy to work regardless of the content of the fields in the database.

- ✚ Added a “**Template**” button to the document tab of the task edit form. This button allows users to apply a template to the currently highlighted document. The user must have access to the document for this function to work. If the document is a finalised document, the document will be reactivated, before the template is applied. Once the template is applied, the document is finalised again. The user is asked if s/he wants to proceed if document is a finalised document. The document properties

form will be displayed so that other properties could be set if needed. Please use this with care. When a template is applied to a document, all of the document properties such as security groups, security users, keywords etc. will be deleted before the template is applied. If the selected document is secured, please ensure that the proper security is put in place if your template does not include them. This button is only available from non-master matters.

- ✚ In many cases, especially when faxes are received, a user may have to view the message or fax to see if it should be kept in the system. When the user loads the message or fax in Synergy, it gets marked as viewed and after that, the message could not be deleted even if it is considered as junk mail. Added a new option to the company defaults, “**Allow deletion of viewed messages**”, that allows Synergy to bypass the validation for message viewing. This option is turned off by default to allow Synergy to work identically to previous versions.
- ✚ In the workflow form, the delegation button is now unchecked by default. Users have to check this if they want to delegate it to specific users.
- ✚ Added an “**Import**” button to the postmaster tab of the workcentre. This will allow multiple files to be imported.
- ✚ Added ability to filter the postmaster list by primary or related client of the documents. The “**Rel. client**” check box determines if the filtering is based on primary or related client. If this check box is unchecked, the filtering is will be done based on the primary client. If the check box is checked, then related clients will be used for filtering.
- ✚ Fixed a bug in the postmaster tab of the workcentre. This bug was being generated when you had selected a user and trying to move some document to another user’s postmaster tab.
- ✚ The reset button in the workflow form was not resetting the automatically related associates in the primary client section. This is fixed now.
- ✚ The workflow form now displays the document name if only one document was selected from the postmaster tab of the workcentre.
- ✚ Enabled the workflow button in the postmaster tab of the workcentre regardless of the user’s scanning application setting.
- ✚ When “**Scan/Import only**” check box is checked, the user is able to import or scan without creating a workflow. However, once the first scan/import was done, Synergy was displaying the replicate check box. The replicate check box is made invisible when “Scan/Import only” button is used in the workflow form.
- ✚ Added two new setting to the housekeeping company defaults that allows a background picture to be stored for 1440X900 and 1600X1200 screen resolutions.
- ✚ When clicking the “**Go to matter**” button from the billed section of the “**View Costing Details**” form of the CCC was not loading the MCC. This is fixed now.
- ✚ Added a new button to the “**Unbilled Time**” tab of the MCC that allows users to write off multiple entries from the list. This will not prompt for write off amount and will assume that the user wants to write off the balance amount left on the selected entries. A pop-up menu is also added to ease selection of all entries if there are too many.
- ✚ When writing off/up an entry from the “**Unbilled Time**” tab of the MCC, the entry in the costing list box (the list at the top which displays total unbilled amounts) was including the entries that were invoiced as well as those unbilled ones. This is fixed to show the total of unbilled entries only as it should.
- ✚ When selecting users for delegations, some options in the user selection form allowing the user to select inactive users. The selection form, now, validates to ensure that all selected users are active.
- ✚ The some processes in the check in tab of the “**Briefcase Control Centre**” were not working correctly when document renaming was being used. The list box is changed to allow sorting as well as full display of the file names. The check in and other processes have been modified to consider the document renaming.

- ✚ The Sheridan tab controls used by application has been replaced with more modern looking tab controls. The tab control could provide many different appearances. System administrator can define how the tab control should appear. Those users that are allowed to customise application will also be able to change this for themselves. These users can do this through a new sub-menu item under the options menu.
- ✚ We have also provided skinning infrastructure in this version. You can use “**cjstyles**” and “**msstyles**” files for skinning Synergy application. We provide 5 skinning options, Native Windows XP, Windows XP Metallic, Windows XP Homestead, Windows Royal Blue and Office 2007 styles. Please note that these files must all reside on your system directory under a subdirectory with the name “**SkinsAndStyles**”. Synergy will warn you if this directory does not exist. Please copy this subdirectory from the installation CD to your System directory.
- ✚ The text box that was displaying the full path of the document in the “Import Document” form allowed a maximum of 150 characters. This is now increased to allow the full path of the selected document.
- ✚ Fixed a bug in converting matters. It was failing when attaching a related client that was already attached to the new matter. This is fixed now.
- ✚ Added a button to the housekeeping that allows System Administrator to maintain bulletin board messages. This way, SA has the ability to delete or change the entries for users that have been inactivated from the system.
- ✚ Added a security group to the company defaults that allows restriction to deletion of the approved disbursements. By default, everybody can delete the disbursements. However, when a security group is linked, the users in that security group are the only ones that can delete these disbursements.
- ✚ Added a new “Copy” button to the key words tab of the document properties form. This button takes the functionality of the old “Edit” button, that is, it allows you to select an entry and create a new key word based on the selected entry. The “Edit” button is changed to allow users to modify the selected entry rather than adding a new entry. If the modified entry is already in the list, the selected entry will be changed and the existing duplicate will be removed from the list ensuring that there is only a single instance of a key word for the document.



### *Modification as at release 06.00.00*

- ✚ Added a menu option to the document audit form's file list (HK, doc tab, audit button) that allows the files that have no reference in ZZDOC to be moved to the recycle bin. This menu option is only added if a site is using recycle bin.
- ✚ When adding companies in Add/Edit company form, Synergy was insisting on unique database name. This is OK for Access and Fox Pro databases but for SQL Server databases, one may have identical database names on different SQL Servers. Uniqueness of database names, now, considers the server name for validation.
- ✚ The "Go to task" button from the "Messages" tab of the Workcentre was simply loading the task from. In many cases, it would be useful to have the Matter Control Centre loaded with the selected matter as well. Synergy now, loads the Matter Control Centre first and then loads the task form when that button is clicked.
- ✚ Added two options, "Increase budget" and "Decrease budget", to time and disbursement budget pop-up menu.
- ✚ When reactivating a task, a user may have to select a follow-up to be actioned. The form that allows user to select a follow-up is changed as follows:
  - 1) The button is named "Mark actioned".
  - 2) The description at the top also changed.

Last actioned	Client name	Due date	Follow-up type
	Some Client	11/08/2006	Some follow-up

- ✚ Allowed matter constraints to be turned disabled from miscellaneous tab, company defaults, housekeeping. When disabling the matter constraints, the user is asked whether the existing constraints should be deleted. A "Yes" answer will delete all of the existing constrain. If you disable the constraint, constraint will not be copied from master matter to other matter and no validation will be done regardless of existence of the constraint in the database.
- ✚ Added a security group that allows disabling of the document cataloguing. This option of document importation might be useful in very rare cases. Our experience has shown that many users are unaware of the implications of using this option and circumstances that this should be used. Consequently, we have allowed the System Administrator to decide whether this should be available to everyone. There is not default security group attached to this setting and hence the system will behave exactly the same. However, if a security group is set, only those users within that security group are allowed to use document cataloguing.
- ✚ Added an option to company defaults that enables users to use enhanced common properties. In this mode, a form will be displayed that allows users to decide what properties need to be copied from a document to others. By default, this option is turned off allowing STS to work as before.

The default values for the various properties that could be copied from this new form are set as follows:

- 1) Retain the original name,
- 2) Retain the original comments,
- 3) Copy the document priority level.

- ✚ Fixed a bug that was causing problem when master documents were being moved from the company defaults.
- ✚ SQL Server 2005 integration has been incorporated on this release. We have made every effort to cater for majority of the differences between the previous versions of the SQL Server and 2005 Editions. However, if you find any problems with 2005 Editions, please let us know and we will endeavour to rectify the problem as soon as we can.
- ✚ Some changes have been made to the document auditing to make it run faster when there are 1000s of files.
- ✚ Fixed some spelling errors in the “**Put task on hold**” and “**Import message**” forms.
- ✚ Company Activity Report from Reports Gallery (ZZCMPACT.RPT) was getting syntax error 3075 when used with companies running Microsoft Access Database backend. This is now fixed.
- ✚ Added an option to the company defaults that allows sites to avoid checking out active documents when time cost is enabled. Please note that if a site is using full document security, active documents will always be checked out regardless of the setting for this option.

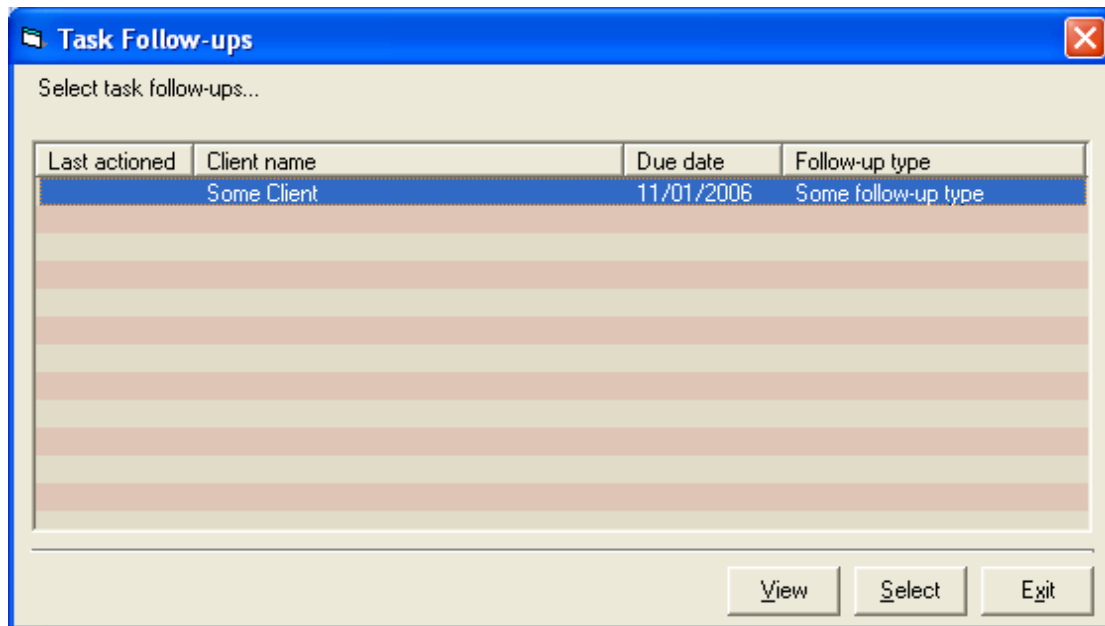


### *Modification as at release 05.02.01*

- ✚ Added ability to loop and ask the same question multiple times when a decision is being made. This will help to repeat a question and create multiple branches of a decision node if needed. Please note that the answers that will terminate the looping will also themselves be processed before the loop is terminated.
- ✚ Fixed a couple of minor visibility issues in the scanning/workflow form.
- ✚ Added the path to DataWhiz.mdb and Startup.mdb to the license information display on the “Add/Edit Company” form.
- ✚ As you may be aware, there is a setting at the housekeeping that allows logging of changes to users that are responsible for the matter task and delegation. In the previous versions, turning this option on, only kept track of user changes for the matter, task or the delegation. From this version, we have extended this feature to include the deletion of the matters and tasks (but not delegations). Please note that only matters and tasks that are created successfully will be logged upon their deletion. If the user does not complete creation of a task or matter, their rollback will not be logged in the history. This will avoid logging matters and tasks that were never committed to the database.
- ✚ From this version, the matter and task approval will be logged in the system based on a housekeeper setting.
- ✚ Fixed a bug in applying common properties from Post Master form. It was displaying the wrong document description.
- ✚ Fixed a bug in mapping task in the task edit form. Although it was mapping the answer to the correct task, while manipulating the answers, the task description was wrong.
- ✚ When a template contains a list of clients and the user tries to create a message for one of the clients from those included in the template, it was generating an error because of the duplicate client. This is fixed now.
- ✚ In document properties form, when the paper based version of document is marked destroyed, the font colour of the folder description will be dark red. We have also appended “(**Paper based copy not in RMS**)” to the folder description in the “Misc” tab to indicate that the paper base copy no longer exists in the RMS.
- ✚ The “**Folder**” button in the “Misc” tab of the document properties form is disabled for paper based documents that are marked destroyed.
- ✚ Added a “**History**” tab to the document properties form. This tab will only be displayed if there is a request history for the document.
- ✚ Changed the description that gets displayed when a document is selected from a list (e.g. documents list in DCC) to indicate if the document is marked destroyed. Those marked as destroyed will have “**Paper based copy not in RMS**” on the first list.
- ✚ In the RMS tab of the DCC, displayed the request date for the documents list when “**New folder to request**” option is selected from folder combo box. This used to display the recall date.
- ✚ The templates originally started as filing templates since they were only used to add filing classifications to documents. However, they were broadened later on to be just a repository of certain characteristics for different entities. It is no longer valid to call them “Filing Templates”. We have renamed them to just “Template”, that is removed the word “Filing”.
- ✚ Added a check box to the document search form that allows searching the fax cover sheets only.
- ✚ Added an option to the housekeeping company defaults that allows sites to make fax cover sheet optional.
- ✚ Added a new button “Fax clients” to the documents tab of the MCC. This button will behave identical to the “Email clients” button except that it sends faxes instead of emails. There is also an option to pick a single cover sheet for faxes. The compress option obviously is not available when faxing.

- ✚ Import message form was not refreshing the list view properly when Emails were being imported from the default Inbox. The messages were being left displayed on the list view despite the fact that they were either being moved to “**Imported Messages**” folder or they were being deleted depending on the housekeeper setting. Force refreshed the list view at the end of the importation.
- ✚ Added a tool tip text to the disbursement list box in the timecost tab of the workcentre. The tool tip text will display the disbursement budget for the selected matter. Just leave the mouse on top the row for a second or so and the disbursement budget will be displayed.
- ✚ Added two extra columns to the end of the disbursement list in the disbursement tab of the MCC, approver and approval date. These columns will display the corresponding information if the item is approved.
- ✚ Creation of invoice document was replacing all non-default replacement symbols with blanks. The invoice document creation process has been changed to allow user input of any necessary replacement symbol. Please note that during the replacement process, there is no provision for exit.
- ✚ ST Synergy did not allow addition or modification of disbursements when the total amount of disbursements exceeded the budgets set at the matter level. In this version, we have added a switch to the housekeeping, company defaults that allow users to exceed the budget. In this case a warning message is displayed instead on an error message. The user has the option to proceed or stop.
- ✚ When adding disbursements to a matter, a right mouse click on the list in the documents tab will display a popup menu. Two new entries have been added that allows you to scan more documents as well as launching the selected document.
- ✚ The time and disbursement budget records in “**ZZMATBUD**” were only storing the adjustments to the budget. We have added a new column “**TotalBud**” which records the current budget after the adjustment.
- ✚ In the previous versions, the users could manually enter the total disbursement and time budgets which might not necessarily add up to the total budget amounts in the list. From this version we have disallowed this, that is, the total budget is calculated as the sum of the entries in the list.
- ✚ Fixed a bug in put task on hold related to the entry of the start date for the hold history record. In certain cases, the users were unable to enter any dates. Apart from the default date. This was due to an error in determining the minimum and maximum valid dates. The form was using a string comparison to determine this rather than a date comparison. A similar error would happen when entering the date and time for paper based document request cycle. Both of these errors should be fixed now.
- ✚ Fixed a bug in document path relocation in the housekeeping documents tab. When not selecting a size, an overflow (division by zero) error was being generated. This is fixed now.
- ✚ In the document server audit form (Audit button – documents tab, housekeeping) allowed the directory path to be entered. To start the process after entering the directory just press the enter key while the cursor is in the entry field.
- ✚ Changed the form that comes up when a task is being reactivated. The new form shows more information about the follow-up. We have renamed the button that used to say “OK” to “Exit” and added a new button called “View” that allows users to view the follow up and see the details. When follow ups are viewed this way, the user is unable to modify the follow-up. For view button to work, you need to allow view access to follow ups from company defaults in the Housekeeping. The new form looks like this:





- ✚ The message form was not displaying the external clients in the To, CC and BCC list. This is fixed on this version.
- ✚ Added a “**Convert**” button to the external client control centre. This allows external clients to be added to the system as normal clients.
  - All of the profiles from the external client will be copied to the new client.
  - The new client will be added to as the client of any messages listed in the messages tab of the external client.
  - The new client will be added as the related client to the matters listed in the matters tab.
  - The original external client will not be deleted.
- ✚ When searching for documents from the document control centre, if there was no document found to match the search criteria, Synergy used to display “**No documents were found to match the selection criteria!**” message. In the previous version, Synergy was not displaying this message. This bug is fixed in this version.
- ✚ Added retention code to the document search form.
- ✚ Added 4 new options to creation of matters from a workflow decision. These options allow copying of documents, messages, communication and related clients from the matter that decision is being made to all new matters.
- ✚ Added a new option to housekeeping, company defaults that allows sites to specify when creating matters from a workflow decision, the matter edit form should be displayed or not. Please remember that an exit in this instance will not delete the matter. It just means that the user does not want to change anything.
- ✚ Added a combo box to master matters that allow sites to specify if matters created from that master have to capture a specific additional data. Please remember that this option is not enforced. When a new matter is created from the master; the additional data form will be displayed. However, the user can exit from the additional data form.
- ✚ In the client enquiry form; the form that comes up when “**New query**” button is clicked from the client group enquiry; added ability to specify the columns that users want to extract from the database. This allows users to extract the data that they need rather than everything. If no entry in the list box is selected, all of the columns from the client table (ZZCLIENT) will be extracted. The account number, title and client’s internal identifier will be added to the SQL statement by default if any other field is selected in the list. The “**Run** and Save” buttons are now enabled in case users want to extract all of their client data.

- ✚ When reactivating an on hold task, Synergy was using the calendar days for determining the reactivation date. This was not correct in certain cases. For example:
 

Task creation date:	Friday 14/07/2006
Task target date:	Monday 17/07/2006
Placed on hold on:	Friday 14/07/2006, 1 business day - 1 calendar day
New target date:	Tuesday 18/07/2006
- |                               |  |
|-------------------------------|--|
| Reactivated on:               | Monday 17/07/2006                        |
| Synergy was calculating:      | Saturday 15/07/2006 as reactivation date |
| Synergy should now calculate: | Monday 17/07/2006 as reactivation date   |
- ✚ Changed the message **“Do you want to cancel all of the requested paper based Documents?”** to **“Would you like to cancel your request for all of the selected items?”**
- ✚ In document dispatch form, changed the check box description **“Mark destroyed”** to **“Mark document surrendered”**. This seems more inline with what really is happening, that is the organisation is surrendering back the paper based documents. All messages related to this process is also changed to say surrendered.
- ✚ Added **“Delivered documents must be returned to the Records Management Officer who will mark them as returned.”** Message to the bottom of the error message that gets displayed when cancellation of requested paper based documents fail. This will remind users that delivered documents must be returned to archives.
- ✚ Changed the way Synergy determines the list view icons for the documents. Synergy used to look at the Windows Registry and extract the first application from the **“Open With”** section of the registry. The list views should now display an identical icon to those displayed in the standard Windows Explorer. Please note that this may require Unicode support to be installed on Windows 95/98 and ME systems.
- ✚ There was no facility to relocate the deleted documents in Synergy. A new tab was added to the path relocation to allow ability to change the file path in the document history table.
- ✚ Some columns were added to the matter, document and tasks table which were missing in their corresponding history table. These columns are now present in the history table. The existing data on the history table will have nulls or zeros on these columns. However, moving forward, these columns will have the proper values from the deleted entity.

### *Modification as at release 05.02.00*

- ✚ Added ability to automate copying of the associates of the primary client of a matter when creating new matters. The associates are determined by the association category selected either at the housekeeping, matter type or the master matter. For sites that want to copy a specific category of associates regardless of the matter type or master matter, they can set this at the housekeeping (matters/tasks tab). If a site requires more control, they can leave the housekeeping option blank and then select an association category for the required matter types. If this option is not flexible enough, then you could define which types of associates to be copied for each master matter. It is envisaged that only one of these approaches will be used in a given organisation. However, if a combination of these are used, Synergy will process these as follows:

when matters are created from master matters:

- 1) The association category linked to master will be used if it exists
- 2) The association category linked to master matter type will be used if it exists
- 3) The association category from the housekeeping will be used if it exists

when matters are created from other matters:

- 1) The association category linked to matter type will be used if it exists
- 2) The association category from the housekeeping will be used if it exists

For this option to work in any level, the check box in the housekeeping must be ticked.

- ✚ In the workflow form, added an option that allows addition of client association (based on the selected client) to the imported/scanned document. This option will only be available if the automatic copying of related client is activated from housekeeping and client is an existing client (a new client will not have any associations). The associates are attached to the document but will only be attached to the matter if a new matter is being created. The documents imported/scanned from the workflow form are the only documents that can use this facility.
- ✚ Added an option to the company defaults (miscellaneous tab) that allows users to delegate a matter when it is created. This option is available from the workflow form as well as the master matter selection form. Obviously, all of the delegations of the first task of the matter will be deleted before the new delegation is added. If a matter does not have any tasks, then no delegation will be added.
- ✚ Added a postmaster tab to the workcentre. This tab will only be made available to those that are defined to be postmasters. The users combo box will have the logged user, and any teams that user is a member of (provided the team is defined to be a postmaster). There is an option to see of the pending document for the user and all of the teams or just the ones that belongs to the user or a specific team. Most (not all) functions from the postmaster is available in this tab. There is a new button that allows a user to move a set of documents from his list to another postmaster user or team. The user is also able to create workflow by selecting documents and using the workflow button on this tab. Remember that when you are creating a workflow item from this tab, all of the existing clients and tasks will detached from the documents before attaching the new clients and workflow items.
- ✚ Added ability to just scan or import documents in the workflow form. This allows users to scan or import documents without having to create a workflow for them. The postmaster check box and combo box allows the scanner to specify that the

documents should be kept in pending status and which user or team (must be defined as postmaster) in the organisation needs to be taking care of the scanned/imported document. This option will not be available when the workflow form is activated from a task or client or the postmaster tab of the work centre. When scanning/importing only, the client section of the workflow form must be completed.

- ✚ In the task tab of the work centre, the “**Edit**” and “**View delegation**” buttons were displayed under the “**Claim**” button when “**Tasks delegated to me**” option was selected from the combo box. The buttons are placed properly and made visible.

- ✚ Added ability to create new matters based on an answer given to a decision. The matter creation is based on a template that will be stored against the decision node when mapping an answer to tasks. There is an option to copy the related matters when new matters are created. If this option is selected, all of the newly created matters will be related to each other and the original matter as well as the related matters of the original matter. For example, if matter 1, 2 and 3 are all related to each other and a decision on matter 1 leads in creating matters 4 and 5, the related matter tab would look like as follows:

Matter 1: 2, 3, 4, 5

Matter 2: 1, 3, 4, 5

Matter 3: 1, 2, 4, 5

Matter 4: 1, 2, 3, 5

Matter 5: 1, 2, 3, 4

Double clicking an item from the list box in the decision tab of the task form will allow you to change the settings for an answer.

- ✚ Added an option to housekeeping that allows System Administrator to specify that when STS is printing a document in batch mode, it has to wait for the document to appear in the printer queue before considering the document as printed. This option allows SA to specify a waiting interval in seconds. The allowable values are:

-1 Do not wait, continue the process,

0 Wait indefinitely until the job appears in the queue (use this wisely),

1-600 Wait this many seconds for the job to appear in the queue.

- ✚ Added an option to housekeeping that allows System Administrator to specify that when STS is printing documents in batch mode, it has to wait for the document to be de-queued before processing the next document. This option allows SA to specify a waiting interval in seconds. The allowable values are:

-1 Do not wait, continue the process,

0 Wait indefinitely until the job is printed (use this wisely),

1-600 Wait this many seconds for the job to be de-queued.

- ✚ Added an option that allows SA to specify that when printing PDF file, use internal DDE messages to print the file. This option allows SA to specify a waiting interval in seconds. The allowable values are:

-1 Do not wait, continue the process,

0 Wait indefinitely until the DDE transaction is completed,

1-600 Wait this many seconds for DDE transaction to complete.

Our implementation of DDE transaction is Synchronous, that is the DDE transaction either finishes successfully or the transaction times out. For instance, if a value of 0 is used, STS will wait until the DDE transaction is completed. If a value of say, 50 is used, the transaction will time out if the PDF file could not be printed in 50 seconds.

- ✚ Added an option that allows tracking of document prints in batch mode using the above options. If none of the above options are used, then the document will be marked as unprinted if and only if the application responsible for the document could not be launched successfully. Printing can only be tracked if the application that is printing the document will include the file name as part of the print job description. If the file name is not included, Synergy will be unable to locate the job in the print queue. Word documents with merge fields and Crystal Reports will never be tracked within Synergy.

- ✚ The above tracking options are linked to batch printing from the following locations:
 

Documents Tab	Matter Control Centre
Documents Tab	Client Control Centre
Documents Tab	Task Control Centre
Import documents Tab	Mail Dispatch Centre (Import and Print option)
Documents Tab	Document Control Centre
- ✚ Added a tab to the Mail Dispatch Centre that allows users to look at their unprinted documents. Users can print or launch any of the unprinted documents. If a document is printed, the user will be asked whether to remove the selected entries from the list or not. When user removes entries from the list, the record is marked as printed in the database and cannot be brought back.
- ✚ Added a popup menu for selecting and deselecting entries in the documents tab of the Document Control Centre. You can now manipulate the list as you wish. The “Clear list” button is no longer available. Use the right mouse button to clear the list. This will allow users to easily select
- ✚ Allowed retention codes to be stored for document templates. Also amended the document template processing to add the retention code to the document when template is applied to a document.
- ✚ Changed the client synchronisation form so that all controls are disabled until the connection details are set. Once the connection details are entered, the controls are enabled and the user can start mapping columns. The columns combo box has been moved down so that it does not obscure the table name field. Also fixed the popup menu so that all of the options work properly.
- ✚ Corrected an error in calculation of follow-up date when tasks were being put on-hold. The follow-up date was being calculated to be identical to the new target date. This was correct in some cases but not in all cases. This is now fixed. The task’s new target date was always correctly calculated.
- ✚ The calculation of target dates for matters and tasks was not using the working day set up at the housekeeping. It was always considering Monday-Friday as working days. This is now corrected to take the housekeeping setting into account. As far as we know, there is no site that has Saturday and Sunday defined as working day so this would have been OK everywhere and hence why it was only noticed when we were testing with a different working day configuration.
- ✚ In reactivating an on-hold task, the target date of the task will be revised if set at the housekeeping. The new target date calculation was using the calendar days rather than business days. In special cases, the new target date was not correctly calculated. These cases are probably rare and hence the reason why it was only noticed during our testing with different housekeeping configuration. This error has been corrected. STSynergy will now use the business days as follows:
  - If business days are zero, that is the task is reactivated on the date that it was due to be activated, no adjustment will be done to the target date.
  - If the business days is negative (say -2), that is the task is reactivated before it was due (in this case two days before it was due), the target date of the task will be adjusted back by that many business days (in this case two business days).
  - If the business days is positive (say 2), that is the task is reactivated after it was due (in this case 2 days after it was due), the target date will be adjusted forward that many business days (in this case two business days after the target date).
- ✚ Added an arrival date and time to the RMS folders. This will allow users to record the arrival date and time of the external RMS folders. Please note that the arrival date must be on or after the check out date. These will be initialised to the checked out date and time for all of the folders that are currently check out.

- ✚ Added two new settings to the housekeeping that allows sites to set a default due date for RMS folders and paper based documents. This setting will be used to calculate the default due date for the RMS folders when they are checked out and paper based documents when they are delivered to the requester. The number of days is not enforced that is the user can still change the due date. It is just a suggested due date. The calculation is done based on business days rather than calendar days.
- ✚ Changed the Mail Dispatch Centre so that when the importation of documents starts, user cannot click on other tabs. If the user tries to close the MDC form during importation (either by clicking the X button or selecting close from system menu), s/he will be asked if s/he wants to cancel the importation process. If the answer is no, the process will continue on as normal. If the user says yes to the question, the process will continue with the importation of current document and will only stop after the current document is processed and before importation of the next document.
- ✚ Added a button to the messages tab of the workcentre that allows users to attach multiple clients to multiple messages from the list. Only the messages that the user is allowed to view will be processed. Messages that have been sent; will only be processed if it is marked as editable. This button is only available in the inbox.
- ✚ When creating new Records Management Folders for a Matter (from MCC), the primary client of the matter was not being passed to the form. This is now corrected. The validation now ensures that a client is selected before record is committed
- ✚ The RMS check out form now displays information about the folder being processed on the title bar. Also displayed the due date when the folder location is being updated or checking in the folder.
- ✚ Added ability for full request cycle for paper based documents from archives. The processing is as follows:
  - A user requests the paper based document. The document is marked as requested with a date and time and the user that has requested it.
  - The Records Management officer checks out the RMS folder. At this stage the document will be marked as recalled with a date and time.
  - When the RMS folder arrives, the RM officer marks the RSM folder as arrived. This changes the status of the requested document to arrived.
  - The user can then go to the RM officer and ask for the document. When the document is delivered to the user, the RM officer should change the status of the document to delivered. The RM officer will be asked to provide a date and time for delivery and due date and time. If the above housekeeping setting is used, the default due date will be set to the number of days specified after the delivery date. This calculation will use business days rather than calendar days.
  - At this stage two things can happen.
    - The document could be dispatched to a client. During this process, the dispatch form allows user to specify that the paper based document is being dispatched. The status of the document will be changed as dispatched and as far as the process is concerned, the cycle is complete. The user can also indicate that the document no longer exists in archives. This can be done by selecting “**Mark as destroyed**” check box from the dispatch form. If this option is selected, the document will be marked as destroyed with the dispatch date and time specified in the form. Once documents are marked as destroyed, the request cycle becomes unavailable for them.
    - The document could be returned to the RM officer. When the document is returned, the RM officer is the only person that could mark the document as returned.

Please note that a request can only be cancelled before it is marked as delivered. Once the user receives the document, it can only be returned to RM officer or dispatched to the client.

Please note that when a document is requested, if the folders has already been check out, the status of the document will be set to “Recalled”. If the folder is already arrived, then the status of the request will be set to “Arrived” because the folder is already arrive.

We have also altered the check in process to look for the paper based documents that are outstanding. The user will be warned that there are documents that have not been returned and will have an option marking these as returned.

Please use extreme caution when marking documents as destroyed because it is irreversible. If you need to remove the document from its folder, this has to be done manually. However, we have altered the documents that are displayed for a folder to exclude the ones that are marked as destroyed that is if you click on the documents button on the records management tab of CCC, MCC or WC, only existing documents that are in that folder will be display.

- ⊕ Two new tabs are added to the DCC. The first tab allows users to look at the status of their own requested documents. The second tab allows Records Management Officers to look at the status of the folders and document. Various options have been provided for the processing cycle.
- ⊕ A new button is added to the document’s tab of the DCC that allows the request cycle to start. The button is called “**Request**” and is the left most button at the bottom of the tab.
- ⊕ Fixed an error in deleting the matter types from profiles.



***Modification as at release 05.01.02c***

- ✚ Fixed an error in client synchronisation process. The error was in copying data from external database (text files) into the Synergy staging table ZZSYNREL. This error will not affect the sites that do not have configured the system to import data from external databases.



### *Modification as at release 05.01.02b*

- ✚ When emailing documents from to clients using the “Email clients” button from the documents tab of the Matter Control Centre, we have added a button to select a profile. If a profile is selected, only the clients that have been profiled with the selected profile will be included in the email list.
- ✚ When processing updates, the client synchronisation process was creating an activity status history record even when the activity status identifier was the same. Changed the code so that these records are not created unnecessarily when the activity status identifiers were identical.
- ✚ Added a button that allows users to run a client related stored query from the client search screen for populating the list. The queries that are listed for selection will be those that have “ZZCLIENT” in the “FROM” clause and “AccountNo” in the “SELECT” clause. The match is always done on the “AccountNo” column. This is a two step process. The first step is to run the stored query and build a temporary result table. The next step is to populate the list with the details of the client from the temporary table. The result table will be deleted after the list box is populated. This button will only be available when the form is in search mode; that is the result is populated in the form itself.
- ✚ The maintenance of filing templates from house keeping used to have two forms, one to select a template type and the next one a pick list of items with the selected criteria. These two forms are now combined into one form. We have also added a new button that allows users to find an existing database entity and base the new template on that entity. With this button, you can, for instance, search for a document and use that document as the base for the template. Remember that this is only available from housekeeping.
- ✚ When matters are duplicated, the primary client is copied from the old matter to the new matter (only when the new matter is not for another).
- ✚ A few versions back, we introduced a setting that allowed all staff to trust each other. However, in the work centre, we only enabled the diary tab when this setting was effective. On this version we have extended this to the other 7 tabs that you can set for each trusted user from housekeeping.
- ✚ Improvement in the performance of adding clients from external sources in the document properties form (Clients tab, “Ext. Src.” button) have been achieved. This improvement is orders of magnitude better than the initial implementation of this feature.
- ✚ The client synchronisation process now allows sites to specify a program to run before it starts processing the staging tables. This will allow sites to specify a data loading program to run before the synchronisation start. The processing is done in the following order:

- 1) If there is a program specified in the housekeeping, this process is started right at the beginning. The specified arguments will be passed to the program. The synchronisation process will wait until this process terminates. If the program cannot be started, the process will terminate.
- 2) The data from the external database will be copied to the staging tables if this is set up. If there are any errors in this step, the process will terminate.
- 3) The synchronisation process starts processing the staging table.

As you can see, if you do not specify a program or external database, then the process is identical to what it was in previous versions. Please note that the windows account that runs the synchronisation process must have access to the specified executable and must be able to start the program.



Added a new report to the reports gallery that allows to look at summary of matters, tasks, clients, classifications, documents or communications within a date range. Please copy ZZCMPACT.RPT from the setup CD to your system directory (SysDir).

### **Modification as at release 05.01.02a**

- ✚ Fixed the error in calculation of the follow-up date when tasks are held.
- ✚ Added ability to fill the client synchronisation staging tables from an external source. This external source could be an access database, text file, Excel file, Fox-Pro database or SQL Server database. The table and column names within these databases are stored in the STS database. There needs to be a one to one mapping between the table names in the external database and the staging tables. For example, the ZZSYNCLI in STSynergy database will be refreshed from a single table from the external database. All of the codes in those files must exist in the STSynergy database. For instance, if you specify a client type in your external database, this client type must be the code that exists in STSynergy database. This process is not responsible for translating external codes into internally usable STSynergy codes. If you are using text file, it must be in fixed length format without column headers. The order and length of the columns in the text file must match the order and length stored in the STSynergy database.
- ✚ Changed the file naming convention for the log file of the Synchronisation process to conform to the new naming convention. The file will still be attached to the message as per usual.
- ✚ The client synchronisation process was not allowing previous account numbers of a client to be reused for that client. A few versions back, we allowed this to happen through Synergy interface. The synchronisation process is, now, updated to allow reuse of a client's previous account number.
- ✚ Added two buttons to allow use of library text when sending emails using the "Email Client" button from the documents tab of the Matter Control Centre.
- ✚ Changed the import and dispatch function to leave the pending flag on document, if an invalid client identifier is provided (one that does not exist in STS database).
- ✚ Added an option to the housekeeping to relax the uniqueness of business names. We **strongly recommend** that you use **unique business names** for each client. In cases where business names are transferred from one client to another, you should inactivate the business name from the previous client and then add the business name to the new client.
- ✚ Synergy uses the logical document name as the display name for any document that is being attached to an Email. Some clients prefer to have the physical file names to be used as the display names. An option has been provided to switch to this mode. The default is off, that is STS will continue to use logical document names as the display name.
- ✚ Added a workaround for the importation of documents from Mail Dispatch Centre that overcomes the date format problem on sites that have installed their SQL Server with US English as the installation language.
- ✚ The popup menu for the related client list in the workflow form was not allowing users to remove entries from the list. This is fixed now.

### *Modification as at release 05.01.02*

- ✚ Added two tables to keep history of budget changes for time and disbursements. Also separated the time and disbursement budgets into two tabs in the matter form.
- ✚ Since we added an approval step for disbursements, in some cases, one may want to attach supporting documents that were used for the payment of the disbursement. This is now added to the disbursement form in a separate tab called "Documents".
- ✚ Added security validation for the processing of the document log entries. The log processing will check the user's permission before attempting to delete a document. This will help avoiding clicking OK many times when you have document log entries and you are not given access to delete documents. The entries remain in the table in these instances and the system administrator must go to the housekeeping and remove these entries from the log table.
- ✚ Added ability for some interface elements to take Window XP look and feel on Windows XP machines. This will only work on XP machines and can be turned on/off from the popup menu on the home screen. This configuration is the only configuration that STS stores in the Windows registry. If you as a user do not have privileges to write to the windows registry, then you network or systems administrator may have to set this up on your PC.
- ✚ The write off/up function for disbursements and time entries from the MCC were not adjusting the invoice amount. This is now fixed.
- ✚ Added a new check box to the disbursement tab of the MCC that allows you to see all of the disbursements whether they are invoiced or not. Obviously, you cannot process the invoiced items.
- ✚ Changed the treatment of the timesheet entries for appointments. When appointments are moved from one day to another, the timesheet entries were not being adjusted if it was costed (this could be the case if the appointment was attached to a task and there was enough user information to cost the entry). STS will now change the details of the timesheet entry to reflect the appointment details. Please note that any approved timesheet entries linked to the appointment will remain intact. In this instance, new timesheet entries will be created.
- ✚ Fixed an error that was being generated when deleting the stored queries.
- ✚ Bulk matters from the CGE is now working.
- ✚ When launching documents from the chronology tab of the CCC or MCC, STS was not merging the data from the client. This is now fixed.
- ✚ When creating a document and select any existing document, the document search form gets display for selection of a document. If you select the favourites button, and "Error 5" was coming up. This is fixed now.
- ✚ Added a progress facility for matters. This allows users to custom build the way they want to measure the progress of the matter. The progress details for a matter can be maintained from the profiles tab of the MCC. Each progress record would have a type, can have description, comments, a reference number, date and time and two values. For example, one could use this progress facility to assign points as tasks are completed. Although this has to be done manually now, the future plans are to automate this facility where the approval process will create the required values automatically. Please note that this facility can be renamed. The default name is "Progress" but you can rename it from company defaults, matters tab.
- ✚ Added a security group for controlling access to the new progress facility.
- ✚ Added a progress button to the matter tab of the housekeeping allowing progress categories and types to be added.
- ✚ The import and print function from mail dispatch centre is amended to print the document from the document server. Because the process has to delete the file from the importation directory, it is possible that when the printing starts, the document is actually deleted from the importation directory (printing is done asynchronously). To avoid this problem, the printing is changed to use the document from the document

server. This means that in the environments where document security is implemented, the staff member performing this function must have direct access to the document server.

- ✚ The approval process of the import and print function from mail dispatch centre has also been changed to avoid displaying the approval date form. It always uses the current date for the approval of the matter.
- ✚ Added an option to the company defaults that allows sites to combine import and print functions in Mail Dispatch Centre. When this option is turned on, the import button is made invisible. The only way to import is to import and print at the same time.
- ✚ The date fields merged into word documents having a value between 1<sup>st</sup> and 12<sup>th</sup> of any month were coming up incorrectly on word 2003. It was considering these dates as MM/DD rather than DD/MM. Changed STS to fix these dates before merging the data into the word document similar to the Word XP. The same setting from housekeeping is used for both.
- ✚ Fixed “Error 13, type mismatch” that was showing up when editing a non-document mail item from mail dispatch centre.

### ***Modification as at release 05.01.01***

- ✚ Fixed a bug in the matter form. If a target day hence is specified at the housekeeping or matter type, STS should calculate the target date when a new matter is created. This was being done but when the form was displaying the matter details, it was clearing the target date in add mode. The matter creation form is now displaying the target date of the matter.
- ✚ Fixed a bug in document replacement symbol. Symbols that were based on client association or documents were generating an error at the time of replacement.
- ✚ When there were two application types defined for a document extension (eg word documents may require mergable and non-mergable versions), the importation from a message may pick up the wrong application type for the importation process. This is especially critical when the documents are password protected document sent by an organisation's customer. In these cases, if the word document is imported as a mergable document, then an error will occur when launching the document because STS will try to merge client information into a protected document. It will not be so much of a problem if the password is known to the users but often these passwords are not given to the organisation (e.g. documents sent by lawyers). We have changed the importation of attachments from a message. When there are more than one application defined for the attachment being imported, the user has to select the application type before the importation proceeds. Exiting of the selection form will abort the importation.
- ✚ Added an hourly cost column to user table. This allows sites to keep track of the actual cost of a job when using the time cost system. Remember that this is only considered if time costing is activated.
- ✚ Added a security group to control who is allowed to view the costing information. If this security group is not set, people will be unable to view costing information. We do not want people to work out how much others are getting paid using the time cost system unless they have been given explicit permission to do so.
- ✚ Added two new chart types to the performance tab of the WC for those that are allowed to view costing information. The new charts are called "Net profit/loss" and "Total staff cost". The first one, as the name suggests, will give the net profit or loss, that is the time + write off/up – total staff cost. The second chart will give the total staff cost.
- ✚ Changed various time cost related list views to include the staff cost column.
- ✚ To keep track of time spent on professional/personal development type training, we have allowed timesheet types to be linked to a matter type. This allows sites to create matters representing professional/personal training courses. Once this is defined, when staff member is costing the timesheet entry to a timesheet type that is defined to be a professional/personal development type timesheet, they can select the training course that they have attended.
- ✚ A new button has been added to the CCC and MCC. This button is only visible if the client/matter is linked to a professional/personal development type timesheet entry. When visible, you can invoke a form that allows you to investigate the attendance of various staff member in training course.
- ✚ Added full budgeting to matters. One can specify the budgeted amount for various task types. Also for disbursements, you can specify the budgeted amount for disbursement types. When adding time to a matter, if this budget is exceeded, STS will warn the user. However, STS will not allow addition of disbursements if the disbursement budget is exceeded. Obviously, the budgeting is only allowed if full time-cost system is used. The matter form includes a budget tab and in there the user will see the budget amount and the actual amounts.
- ✚ Added a security group that controls who can do the budgeting.
- ✚ Added an extra approval step for disbursements. When approved the disbursement cost and quantity and unit price fields will be locked from further change. The initial

cost of the disbursement is snap-shotted into a separate column when it is added initially. The disbursements will be automatically approved when they are added to an invoice. They can also be approved individually if needs be.

Those staff members that are included in this budgeting security group will also be able to approve disbursements. Please make sure that the people that are approving invoices are included in this security group as well, otherwise invoices with unapproved disbursements cannot be approved by them.

Please note that upgrade to this version will approve all of the existing disbursements. Changed the name of the invoices tab in the workcentre to "Timecost" and also added a new option to the drop down. This option will allow staff members that can approve disbursements, to view unapproved disbursements. There are provision for bulk approval and some reporting options.

Fixed a bug in the form that allows users to set the accounting system. It was producing errors when QuickBooks type accounting was selected without a company file being selected. Also added a check box for QuickBooks accounting system that allows users to do direct connection

Added a new check box to the company defaults form. This check box allows users to specify if the disbursements should be pushed to the accounting system's creditors ledger. These disbursements will be added to the accounting system as a bill. Some accounting systems like QuickBooks require a payment due date. Although this date may not be mandatory, it does not hurt to set a payment due date. This field is added to the disbursement table and form. When disbursements are added to the accounting system, their transaction identifier is stored in the disbursement table.

Added an option to the company defaults that allows sites to specify if matters can be approved when the balance of the time cost entries is not zero.

Added two new reports to the system, one to display disbursements (ZZTMEDIS.RPT) and the other one for matter budgeting (ZZMATCST.RPT). Please copy these to your system directory.

Allowed mapping of tasks to inactive answers. Also removed display of inactive answers when the user is making the workflow decision.

The addition of profiles to answers was displaying all profiles. Changed it so that it only displays the matter related profiles.

When linking templates to importation directories, each importation directory had to be linked to a template. This is made option on this version. Please note that if you do not link the importation directory to a specific template, the current template will be used for importation. We strongly recommend creation of a few templates that contain all of the importation directories, each linked to the proper template. This way, there are fewer templates to look through when you actually want to import documents.

Added a new menu item for the popup menu on the import and dispatch tab of the mail dispatch centre. This new option allows selecting/deselecting all of the list entries that belong to the same directory.

Added ability to store a default Records Management container for each user. This is available when creating users. The only place that this container is used is in the scanning from when the archive button is selected. It helps to reduce the effort required to select an RMS folder.

***Modification as at release 05.01.00b***

- ⊕ When relocating documents, it may be desirable to be able to restrict the size of the destination directory. This would be useful, for instance, when moving documents to a directory that will be burnt to a CD or DVD. The path relocation from is changed now to allow this. To avoid incorrect calculation of size of the destination directory, please make sure that there are no locked files in the destination directory.
- ⊕ When selecting a message in chronology tab of various centres, the launch button is now made visible so that the user can view the .msg file.
- ⊕ Fixed a problem in selecting task types for hold reasons.
- ⊕ Fixed a problem with the country combo box for the business address.
- ⊕ The result list in the job enquiry form is changed to sortable list view.
- ⊕ The system reports were not being deleted from the company defaults. This is fixed now.
- ⊕ Allowed selection of multiple messages when linking them to a task.



*Modification as at release 05.01.00a*

- ✚ Fixed the communication report to include the client title, matter identifiers and the subject of the communication. Please copy the latest ZZCONTAC.RPT report from the CD.
- ✚ Added totals to the staff budget report. Please copy the report ZZSTFBUG.RPT from the CD.
- ✚ The template description was not being displayed on the importation directory form properly. This is fixed now.
- ✚ Changed the importation from mail dispatch centre so that the document name is always copied from the template. If the template does not contain a name, then the file name is used instead.
- ✚ Fixed an error produced from the task edit form's decision tab. This was related to selecting additional data columns for an answer.
- ✚ The task guidelines were not being copied for any task after a decision. The decision process was amended to copy the task guidelines when copying the relevant tasks from the master matter.
- ✚ Task follow-ups were being copied from master task and made inactive immediately. Follow-up copying was amended to look at the next contact date for setting inactive flag.
- ✚ Changed the task edit form to display all follow-ups for tasks of a master matter when it is approved. When matters are approved, it is possible that all of the follow-ups are marked as inactive and hence invisible in the task form. It was also not possible to click "**Include inactive**" check box. This is now done so that all follow-ups are displayed for master matters.
- ✚ Allowed addition of internal recipients to messages that have already been sent. This will help people to just add an already sent message to another user's workcentre without having to use the forward message button. Remember that you can only add recipients to the CC list. There is no option to delete a user from the list. If you add people to the list by mistake, you have to exit without saving and start again.
- ✚ Appointments could not be deleted. This should be fixed now.
- ✚ The data extraction for chronology report was not quite right. This is fixed now.
- ✚ Users could not enter any date into the target date field of the task form. This was due to the field being locked. This is fixed now.
- ✚ There was an error in the calculation of the next follow-up date when tasks being created. This was occurring in certain cases not all cases. This is now fixed.
- ✚ There was a type mismatch error when creating new clients. This was due to having a blank sort plan number. This is fixed on all of the 3 client forms.
- ✚ Added the appointment type and category description to the comments field on the left hand side of the diary tabs.
- ✚ Added a new option to the housekeeping company defaults that allows sites to allow all users to trust each other. This will be useful where a site needs people to see each others appointments. In this instance, one had to add each user as a trusted user for every other user. This can be turned on from the company defaults miscellaneous tab.
- ✚ Changed the appointment visibility. An appointment is always visible to any of the attendees and the creator. However, if appointment is secured to a security groups or set of users, then, only those having clearance will be able to manipulate the appointment. The trusted users will only be looked at if appointment is not secured.
- ✚ The diary tabs have been changed to follow the above security requirements.

*Modification as at release 05.01.00*

- ✚ The comments field were not being displayed in the chronology report. Also it was displaying duplicate records if a document were attached to multiple tasks. These should all be fixed now.
- ✚ Added ability to attach profile to answers. When an answer is given, all profiles that are allowed to be added to the matter types get added to the matter automatically. If the answer contains profile that is not allowed to be attached to the matter type, then they will not be added.
- ✚ The form that display a tree for the selected matter is now processes a double click on a tree node as a push of the save button.
- ✚ Allowed a decision node to refer to any node in the tree rather than those directly under it. This needs to be fully tested before being released. This allows users to set up a recursive/iterative workflow.
- ✚ Added an option to enable/disable recursive workflow option.
- ✚ Added a new set of addresses to the client called Business address. This set contains attention (BAttention), address line 1 (BAddress1), address line 2 (BAddress2), suburb (BAddress3), state (BState), postcode (BPostCode), country (BCountry), sort plan number (BMailSortN) and barcode (BBCBarcode). The fields are not stored in the ZZCLIENT table. They are part of the ZZCLIBPY table. These fields are recorded in the address history table when any of the address fields (excluding the attention field) is changed. They are also snap-shotted when documents are finalised. All of these fields are also available for merging. Fields in the relevant client edit forms have been repositioned to allow addition of these fields into the user interface.
- ✚ Amended the client synchronisation process to copy the above information from table ZZSYNBPY. Only create a record on this table if the business address or BPay details are changed. An empty table will not affect the current process. Records will be deleted from this table upon success. Please refer to server process documentation for more details.
- ✚ The client importation (excluding importation from accounting systems) process has been amended to import the BPay numbers as well as the newly created fields. The field names must match the as above for importation to work.
- ✚ A new security group is added to the company setting to control who can or cannot change the business address.
- ✚ Added the above fields to the list of fields in the general tab of the AdHoc query form. Also added the BPay number to the list.
- ✚ Removed the standard colour dropdown from the company defaults and replaced it with full windows colour selection form.
- ✚ Fixed the spelling error in the trusted user form.
- ✚ For profile based benchmarking at the matter level, the days were always set as business days even if the matter type benchmarking was not business days. This is changed from this version. If the matter type benchmarking is business days, then profile based benchmarking days are also considered as business days. Similarly for the calendar days.
- ✚ Added a new validation to profile based benchmarking for matter types. The total number of the profile based benchmarking cannot exceed the total number of benchmarking days for the matter type.
- ✚ Fixed a bug that allowed keystrokes to be processed on some disabled fields.

- ✚ Printing diary appointments from a matter was causing type mismatch error. This is fixed now.
- ✚ Added the category description of an appointment type to the appointment description on the diary tab of various control centres.
- ✚ In previous versions, we allowed users to specify partial additional data capture for a decision. However, when they were replicating a master matter in its entirety, these additional data requirement were not being copied to the decisions on the new master matter. These additional data fields are now copied to the decisions on the new master matter.
- ✚ Added guidelines and pro-forma tabs to the document properties form. There are buttons that allows tasks to be copied between the task, guideline and pro-forma lists.
- ✚ Usually, master matters are unapproved for reconfiguration of tasks and other details. In these cases, the user may want to alter many tasks. In previous version, a user had to unapproved each of the tasks that s/he is going to change. This would be time consuming if there are too many of them. After a master mater has been unapproved, we give user the option of activating all of the tasks for that matter. This is only done from the matter control centre.
- ✚ Added ability to attach security groups and users to diary appointments. Since we already had some level of security in place for appointments, we had to add an option at the housekeeping to indicate that the site is using the extended security model for diary appointments. The original rules are still in place; that is the creator, attendees and the trusted users of the attendees should still be able to access the diary item. When the housekeeping option is turned on, the system performs an extra level of security check. It checks to see if the appointment is secured to users or groups. If it is not secured, then everybody have access to view it. Modification and deletion is still limited to the creator, attendees and trusted users of the attendees. If you want everybody to everybody else's appointment, just turn on the housekeeping option but avoid attaching security groups or users to the appointment. This will make all appointments viewable to everybody.
- ✚ Users could amend a diary appointment from time cost system even if they did not have access to it. This is now secured to those that have access to the appointment.
- ✚ Added ability to attach hold up reasons to task types. This link will be used to reduce the number of entries displayed in the dropdown combo box. If a task type is not linked to any hold reason, the list will contain all of the reasons. This by no means removes the ability to attach hold reasons to any task. This is just used for display reason. If the dropdown list does not contain the hold reason, the user can use the "Reason for hold" button to select any reason available in the system.
- ✚ Added ability to customise predefined system report. Users need to create their own report, import them into Synergy, then use the company defaults form to attach the report to departments. If a system report is not attached to a specific department, all members of that department will be using the default report from the System directory. Please note that if your user define report is attached to a query, the data will be extracted using the specified query. However, if the report is not attached to any query, Synergy will run its default query for the report and then run the report. Please note that if you want extra information from the database, you have to use UserDefinedCompanyDSN for this purpose. All default queries have been altered to include the primary key of the table so that users can use it for further data extraction from the company database.
- ✚ Added a budgeted time to matter type and matter profile tables (ZZJOB CAT, ZZPRFMAT). These fields will allow users to specify the budgeted time for each matter type in minutes. The total number of minutes allocated to each profile within a matter type cannot exceed the total number of minutes set at the matter type level.
- ✚ In the task tab of the workcentre, the days to target were not being calculated correctly in cases where the target date of the matter was in the past. The start date

and end date for the calculation of hold days were being passed incorrectly. This should be fixed now.

- ✚ When loading rich text format messages that were sent, synergy was loading the word application to display the content file. Given that the user cannot change the actual content, it seems to be a waste of time to do this. Changed the system to display the unformatted text version of the content rather than the content file.

- ✚ Added a template report to the scanning form and the template tab of the workcentre. The report is called “ZZTMPLAT.RPT” and should be copied from SYS\_DIR of the installation CD. Although the report only contains the external identifier and the description, most of the data from the ZZTMPLAT table is exported to the report table.

- ✚ Additional data definition with list values was not working properly for currency type fields. Also the users did not have full control over the list items. Changed the additional data definition form to allow full control on the list item entries. Removing all entries from the list box or turning has list check box off will convert the list type additional data field to a normal field.

- ✚ Added the reference number to the related matter list of MCC.

- ✚ Added a new tab to mail dispatch centre called “Pending documents”. This tab will list all of the incomplete document importation from the mail dispatch centre. An import is considered incomplete if:

- 1) It does not have at least one classifications,
- 2) It does not have at least one client,
- 4) The matter does not have an active task or the active task is a decision,
- 5) The active task cannot be approved,
- 6) Document cannot be finalised,
- 7) The document could not be dispatched to primary clients,

There are buttons that allows users to email the documents to other users, look at document’s properties, launch the document, and finally move it from their pending list to somebody else’s pending list who is responsible for it.

- ✚ Fixed a bug in forward and import function in the email importation form.

- ✚ When linking an additional data to document, the search form was not returning any data for the selected document. This is now fixed.

- ✚ Changed the matter tree form to a sizable form. It cannot be minimised but can be expanded

### **Modification as at release 05.00.14**

- ✚ Extended the maximum number of characters from 60 to 250 for text type additional data columns.
- ✚ Extended the length of title column for external clients from 35 to 120 (table ZZEXTCLI column Title).
- ✚ Added the approver of the task to the list of matters in the related matter of the MCC.
- ✚ When creating new matters from copying docs button, the related matters is copied to the newly created matter. Also fixed an error that was coming up when user presses exit from the task selection form.
- ✚ The time cost aging report used to display aging details for the client from the timesheet records. In cases where the primary client of the matter is changed after the time sheet entries have been created, the aging report will not match up with the costing details from the matter tab of the CCC. To make this consistent, Synergy will now consider the primary client of the matter rather than the client from the time sheet entries in the aging report.
- ✚ Created a new report that will print the content of the DCC.
- ✚ Added ability to select a department as well as a template type when trying to add/edit templates from the housekeeping.
- ✚ Added ability to copy information from client, matter, task, document properties, communication, and external client into additional data fields when capturing data. The additional data columns can be marked when being created to indicate which type of entity is allowed to be used for search.
- ✚ Extended the external client importation to include Microsoft Excel files. The Excel file could contain the following columns:

Column Name	Column Type	Length	Optional	Comment
Address1	Text	40	Yes	
Address2	Text	40	Yes	
Address3	Text	30	Yes	
Attention	Text	40	Yes	
BCBarcode	Text	60	Yes	
Country	Text	40	Yes	
DateEntry	Date	0	Yes	
EMailNo	Text	50	Yes	
FaxNo	Text	15	Yes	
Gender	Text	1		Mandatory when Title and PreferName is blank.
GivenName	Text	30		Mandatory when Title and PreferName is blank.
MailSortNo	Numeric	4	Yes	
NamePrefix	Text	20		
Occupation	Text	30	Yes	
OtherNames	Text	30	Yes	
PhoneNo	Text	15	Yes	
PostCode	Text	15	Yes	
PreferName	Text	30	Yes	Mandatory only when Title is blank.
ReferID	Text	16	Yes	Non-unique reference number
State	Text	3	Yes	
Surname	Text	20		Mandatory only when Title and PreferName is blank.
TelFaxArea	Text	10	Yes	
TelFaxCtry	Text	10	Yes	
TelFaxExtn	Text	10	Yes	
TelHmArea	Text	10	Yes	
TelHmCntry	Text	10	Yes	
TelMobile	Text	15	Yes	
TelWkArea	Text	10	Yes	
TelWkCntry	Text	10	Yes	
TelWork	Text	15	Yes	
Title	Text	120		Mandatory, when blank some of the above fields must contain data.
WorkExtn	Text	10	Yes	

- ✚ Added ability to mark hold reasons as internal. If an internal hold reason is selected for placing task on hold, the task status will change to on-hold and a record will be created in the hold history. The hold record will have 0 days in business and calendar days and the target date will be the same as the target date for the task. A follow-up will be created if a follow-up type is selected. The follow-up date will be the number of days specified after the current date. This is all that will happen for the internal hold reason. No history or adjustment records will be created. A warning message will alert the user to the fact that s/he is creating an internal record.
- ✚ Fixed a bug in displaying the transaction details (description, amount, ref no) in the debtor/creditor tab of the CCC.
- ✚ All imported attachments from an email message will now be set as incoming documents.
- ✚ Added a new menu option “Import and finalise” to the attachment popup menu in the message form that allows attachments to be finalised after importation.
- ✚ Added a new toolbar option to Email importation form. This new tool bar button allows a user to import Emails and at the same time add internal recipients to the imported messages so that they will appear in those users workcentre as well. This will avoid having to forward a message to those users once the email is imported. These users will all be added to CC list.
- ✚ When emailing documents from the “Documents” tab of the CCC (using the mail box icon), all of the tasks with that matter that have been attached to the selected documents are now gets attached to the message.
- ✚ In stored queries, the held days will always be calculated. The business days will be reduced by number of days held if it is greater than zero. If it zero, it will remain as zero.
- ✚ Fixed spelling error on the hold up history list box.
- ✚ Removed the minimise button from the association tree form that was being loaded using the “Copy Docs” button from the MCC. Given that the form is loaded as a modal form, the user will be unable to navigate to other forms. Also when the form was maximised, the client list was not being displayed properly. It was hidden under the tree view. This is also fixed now.
- ✚ Changed the list box in the document search form to a sortable list. It also now displays the creation date of the document as well as the reference number.
- ✚ Added an option to scanning form that allows users to specify a records management folder for scanned documents. This will help in tracking where exactly the paper based version of the document is supposed to be. Once the records management folder is selected, it is kept until the user changes the folder or user is logged off the system. This is useful in cases where people get a records management box (folder in synergy) for the day and keep scanning and putting the paper into that box. This way once you select the folder, they would not need to pick another one for that day until of course the box is filled up in which case they will have to pick another one.
- ✚ Also added an option to house keeping that allows sites to set a default for the above check box in scanning form.
- ✚ Added a check box to the records management tab of the CCC and MCC that allows the folders that are indirectly linked to a matter or client to be

displayed. These are folders that not directly linked to the matter or client but they contain documents for the selected matter or client.

- ✚ Added addressee postal address details (Attention, mail sort plan number, barcode, address line 1, address line 2, suburb, state, country and post code) to mail merge table. This includes snap-shotting them when the document is finalised. The new fields for mail merge are called AddrAttn, AddrPAddr1, AddrPAddr2, AddrPAddr3, AddrPState, AddrPCntry, AddrPPCode, AddrPSPNo, AddrPBCode.
- ✚ When applying templates to folders, the template description was being copied to the folder description instead of the folder description set at the template level. This is fixed now.
- ✚ Allowed a template to be attached to an importation directory set at the document template. This will reduce the user interaction and minimise the errors in automated importation of documents using templates.
- ✚ When attaching email folders to a user, it was impossible to specify a full path to an email folder. This is important for cases where identical folder names could exist under different folders. For example a receptionist can have access to Inbox of many managers. Synergy was allowing you to specify Inbox only once. This is undesirable as it is almost impossible to allow the above staff member to do his/her job of importing emails for others. Synergy is now changed to allow full path to the folder to be specified. The separator that you should use for this purpose is “\”. The length of the field is also extended to 250 characters. Please remember that the folder names must match exactly (case sensitive) to how they look in the Outlook itself.



### *Modification as at release 05.00.13*

- ✚ Added a user id and password to the company edit form. This allows client sites to use a different user name and password for normal connection through Synergy than that used for database upgrades. If the two user names match, then the passwords should match as well. Even if you enter a different password, Synergy will make the passwords the same. If you enter a user name for database maintenance different to that entered as administrator name, then you can either enter the password or leave the password as blank. During the database maintenance (upgrades, reindex etc), if the password is blank, you would be asked to enter the password. When you enter the password interactively, the password will not be stored anywhere. Please note that these fields are only available for SQLServer type databases. If you leave these two new fields blank, STS will operate identically to the previous versions.
- ✚ The Add/Edit Company form was not insisting on a user name for SQLServer type databases. Although nobody will forget to put a user name there but the form is changed to enforce the entry of an administrator name for SQLServer type databases.
- ✚ The filing template form was not defaulting to the users department when the filing template was departmentalised. This should be fixed now.
- ✚ When creating a matter from another one, the production notes for the matter as well as the tasks are now being copied. This is also done when a decision node is approved. In this case all new tasks will have their production notes copied from the original master task.
- ✚ When putting a task on hold, the users and the escalated users were being copied from the default follow-up type set at the housekeeping for task hold-up rather than the follow-up type selected on the form. This is now fixed. Remember that the current user will only be added to the list of users if there is nobody set up to be responsible for the follow-up that is the user list (not the escalated user list) for the follow-up type is empty from the housekeeping.
- ✚ Added ability to specify auditors for message templates.
- ✚ We now, store the user rate and recovery rate for each billing period and user. This is to help calculate historical budgets for users. This is only available when time cost module is enabled.
- ✚ Added ability to store a set of email folders against each user. This list will only be used when loading the email importation form and nowhere else.
- ✚ Fixed an oversight in adding additional data to matter types when setting up questions and answers. The form where you create the answers were allowing the same matter type to be linked to multiple additional data type. This was not quite correct since there is only one type of additional data can be captured for each matter type. This should be fixed now.
- ✚ Also allowed partial capture of additional data when decisions are made. In the decision tab of the task form, you will now see a additional data column list. This list allows users to specify which additional data columns should be captured when that particular decision is made. Leaving the list empty will capture all of the columns in the additional data.
- ✚ Added an entry date and time to the task hold up. These fields reflects when the task hold up record has been added to the database as the creation date and time will no longer reflect the actual addition to the database. All calculation remains to be based on the CreateDate and CreateTime as before.
- ✚ Added three new time cost reports, staff budget, staff write off and client write off. Please copy the following reports from the CD to your System (SysDir) directory: ZZSTFBUG.RPT, ZZSTFWOU.RPT and ZZCLIWOU.RPT
- ✚ Added the postal address barcode to the CCC general tab.
- ✚ Fixed the type mismatch generated when escape button was pressed from the costing form.
- ✚ Added transaction reference number to the QuickBooks transaction list.



- ✚ Added a new table to keep a history of claims for tasks. The claim history record is added when the user claims the delegation and the housekeeping setting “Claim task when claiming delegation” is turned on. Otherwise, the history record will not be created.
- ✚ Allowed profiles to have benchmarking details, mainly number of days. This can be set up when adding/editing a matter type form in the housekeeping form. If you are adding, you can link profiles to matters as you add the benchmarking. However, when editing an existing matter type, the profile must already be linked to matter type before you can use the profile types in benchmarking.

### *Modification as at release 05.00.12a*

- ⊕ Allowed the history list on the task form to be scrolled for approved tasks.
- ⊕ Changed the way auto-adjustment was calculating the business days.
- ⊕ Removed the message box from the task tab of the Workcentre.
- ⊕ The list box in the task tab of the workcentre, keeps the sort order. The sort order is reset to default (target date) when the option from dropdown changes.
- ⊕ Added a “**Help-desk**” check box to the task tab of the workcentre. This will allow users to exclude the tasks delegated to help-desk from the list. The default is to exclude these.
- ⊕ When a task was being reactivated the CurrRecID in ZZJOBHLD table must be set to null. This was not being done when there was not automatic adjustment done. This is fixed now.
- ⊕ The hold day calculation is now changed to exclude the start date from the calculation. For example, when placing a task on hold for 4 business days from 04/07/2005, the activation date was being calculated as 07/07/2005 rather than 08/07/2005. This is now changed. All business day calculation is now exclusive of the start date.
- ⊕ When you want to put a task on hold with a target date that is in the past, you would have to add extra days to get the new target date to be in the future. For example, on 11<sup>th</sup> of July, a task with a target date of 1<sup>st</sup> July would have to be placed on hold for 13 days in order to get the new target date to be 14<sup>th</sup> of July. All automatic adjustments were done based on the date that the task was put on hold; that is 11<sup>th</sup> of July in the above example. In this case, if you reactivate this task on 12<sup>th</sup> of July, STS rightly assumes that the task has been on hold for one day and the target date will automatically be adjusted to 2<sup>nd</sup> of July. We have changed this and given the user an option in these cases. The user is given the option of adding a history record to the system for the period 1<sup>st</sup> – 11<sup>th</sup> of July and then start the new hold record from 11<sup>th</sup> of July. This way, the user will only need to put task on hold for 3 days to get the target date to 14<sup>th</sup> knowing that the history has been corrected. Consequently, when the task is reactivated on 12<sup>th</sup>, the target date will correctly set to 12<sup>th</sup> of July rather than 2<sup>nd</sup> of July as was previously.
- ⊕ We have added an option to the Housekeeping to allow backdating of the start date for the above history record. When this setting is on, the users are allowed to specify a start date anywhere from the creation date of the matter to day before the task is being place on hold (10<sup>th</sup> of July in the above example). In this case, the number of days on hold is calculated from the entered start date to the date that task is being put on hold. The current target of the task is completely ignore here as the user is saying that the task was on hold for the specified duration. When this option is on, the user is only allowed to put task on hold if the task has never been on hold.
- ⊕ When reactivating a task that was on hold, the automated adjustment record was carrying the reactivation date and time. This is changed to carry the creation date and time of the original hold record plus one second. We will add a new date and time column in the next version V05.00.13 to record the date and time of the entry.
- ⊕ Changed the matter creation so that the creator of the matter always remains as the person that is logged on to STS when matter was created. This was being inherited from the master when the housekeeping setting was on.
- ⊕ The task guidelines were not being saved from the task form. This is fixed now.
- ⊕ After approval of a decision node, all of the sub-tasks under the decision node was being copied from the master matter. However, if these sub-tasks were all approved in the master matter, they would remain approved even in the new matter. This is now fixed. When the tasks were replicated from the master matter, the approval date and the approval flag was set to null and false.

- ✚ When attaching tasks to a message in the message form, the primary client of the matter was not being added to the list of clients. The primary client of the matter is now being added correctly to the client list when adding tasks to the task list.
- ✚ Bulk printing from the document dispatch centre (Import and dispatch tab) was trying to print the item listed in the second column of the list (directory name) rather than the 3<sup>rd</sup> column (file name) this is fixed.
- ✚ Sometimes, it is very difficult to know whether there is a follow-up for a matter or not since the follow-ups are displayed based on their due dates. Changed the “**Due between**” in the follow-up tab of the MCC to a checkbox. However, if the user toggles this off, all of the follow-ups due between 01/01/1800 and 31/12/9999 will be displayed in the list. This default is checked to preserve existing behaviour.
- ✚ The number of days from the escalation tab of the follow-up form was only allowing users to escalate the follow-up after the due date. For example 2 days meant that if the follow-up was over-due by two days, then it will show up in the workcentre of the escalated user. In many cases, the due date is far too important to wait for it to pass before a user is notified. In these cases, the escalated user will certainly wish to know a few days before the due-date if the task is done. This can be achieved by specifying a negative number in the escalation days. This is now allowed for follow-up both at the house keeping and the follow-up details form.
- ✚ Changed the workcentre follow-up tab to add the escalated follow-ups based on new escalation day setting. The list will include all of the user follow-ups as usual. When the “**Display escalated follow-ups**” check box is on, all of the escalated follow-up with “**Due Date + Number Of Days**” that falls between the specified date range is added to the list. The minimum date for this process is the minimum of the entered date and current date (similarly for the maximum date). The “Due Date” is the due date of the follow-up. The “Number Of Days” is the number of days specified for the user in the escalation tab. Example:

Due Date: 30/07/2005  
 Escalated by: -4 Days  
 Will be displayed any day on/after 26/07/2005

Due Date: 30/07/2005  
 Escalated by: 4 Days  
 Will be displayed any day on/after 03/08/2005

- ✚ When importing an email from Outlook into a task directly (from the task form), the primary client of the matter was not being added to the client list. STS will now add the primary client of the matter for any email that is imported directly into a task. Please remember that if you remove the message from the list in the task form, only task will be detached from the message. The client will still be attached to the email. You need to load the message and remove the client manually if you want to detach the email from the client.
- ✚ Synergy was insisting on unique business names across the database. However, in reality, this may not be the case. A business name that is used by one client today may be used by others provided it is expired or inactivated. You can now reuse a business name for any client as long as it is inactivated.
- ✚ In some cases, when adding or copy matters from “**Rel. Matters**” tab of the MCC, the person responsible was not being displayed correctly. This is fixed now.
- ✚ When saving a mail merged word document that is launched from STS, synergy removes the mail merge data source, saves the document and then reopens the mail merge data source again. This is done so that documents are saved without mail merge data source names, hence, allowing them to be launched outside STS without having to create the mail merge data source. However, for some reason only known to Microsoft programmers, MS Word in office 2003 is unable to open the data source

after its removal. Obviously, this causes all of the mail merge functions to be disabled. Strangely enough, the actual mail merge data is displayed in the body of the document but if you have mail merge fields in the header or footer, they get converted to their field codes. Only MS programmers are capable of doing these sorts of trick so beautifully. After tracing this, it became clear that the connection string is nothing like the initial connection string that is passed to the word object. This should be fixed now as STS places the connection string into a variable within the active document and then uses that during the reopen process.

✚ The itemised invoice report was not displaying the comments field from the timesheet entries. This was a data extraction problem and hence, there is no need to update the report. The timesheet comments should be displayed now.

✚ When editing a delegation from the task tab of the MCC, if the delegation is for a help-desk, STS will ask the user if s/he wants to claim this. It should at the same time claim the task if the delegation is claimed provided the housekeeping setting is on. This was not being done in the previous versions. Added required process to claim the task when delegation is claimed.

✚ When claiming the task, the task approver was being changed to the person that claimed the task. However, this was not changing the reviewer of the top-level delegations. This is fixed now.

✚ When creating a matter from a work item (“**Copy Docs**” button in the related matter of the MCC), the related clients of the selected matter was not being copied to the new matter. Instead, the selected related client from was coming up to allow users to select the related client. We have changed STS to populate the list with the related clients of the original matter but still bring up the select related clients form. This will give the user more flexibility. If the related clients are to stay the same, all user has to do is close the form. If they are suppose to change, then the user has the option of fixing the list and then closing the form.

✚ Added an extra check before approving an invoice to ensure that the time and disbursement items do indeed have accounting details before passing the invoice to QuickBooks.

✚ Tested STS with QuickBooks 2005-2006. No inconsistencies were observed.

✚ Added a check box to the debtor and creditor tabs at the CCC that allows users to limit the displayed QuickBooks entries to the current financial year.

✚ Added a button to Housekeeping that allows housekeepers to check discrepancies between STS invoices and QuickBooks invoices. Only those with the security clearance can perform this function.

✚ Changed the content of the form that allows users to select a matter (clicking Favourite button from Task Enquiry form within the time cost system) to display the primary client of the matter.

✚ Added a combo box to the work in progress for client report which allows the report to include information about a single staff member rather than all. The combo box has an entry that allows all users to be included in the report.

### *Modification as at release 05.00.12*

- ✚ Added document version control to the STSynergy. Synergy does not store the difference between the documents or deltas as they are called in version control systems. We keep the entire document because there are numerous meta-data stored against a document. Document revisions could be forced to be read only through a setting from company defaults.
- ✚ Document properties form is amended to display old revisions of a document. This will be in the form of a tree displaying which documents are created from where and their corresponding version number. To enable a document to be version controlled, you need to check “Enable version control” box from this form. Any document created from a document that is version controlled will be attached to the same document tree as the parent. Documents created from a master document which has versioning, will start a new document tree.
- ✚ Added a check box to the document search screen that allows searching the latest versions only. By default the search is done against all of the documents in the document management system.
- ✚ Added ability to calculate business days between two dates in a stored query. The user must specify a column name where the result will be stored and two dates as start and end date of the calculation. In addition to that, the resulting calculation can be adjusted by hold-up days if the query is a matter or task related query. In this instance, the user must specify a column name to be used for MatterID or a column to be used as TaskID. You can also specify a column that stores the hold up days in case you need it in your report.
- ✚ Changed the “Transfer” buttons caption to “Convert”. Also altered the process so that the date received of the new matter is copied from the matter that being converted. All target dates will be calculated based on the benchmarking for the new matter based on the old date received. The active tasks will start from the date received of the matter and their target dates will be recalculated from the benchmarking data. Task follow-up would still use the current date as the start date not the received date of the matter.
- ✚ Added ability to replace the user’s personal folders from the path relocation form. Also added an application type drop down to this form (in documents tab). This will allow certain types of documents to be relocated if needed.
- ✚ Allowed task types to have a single profile. This would help in cases where matters are split into task types that are logically grouped into phases or stages.
- ✚ Added task guidelines. They can be attached to individual tasks. Any guideline attached to a matter will be attached to new matters when they are based on it.
- ✚ Added a new button called “**Copy docs.**” to the related matters tab of the MCC. This button will allow users to create a new matter, select related clients for the newly created matter, and copy the documents attached to the original matter to the selected task from the newly created matter. It will also related the new matter to the original matter.
- ✚ Synergy allows certain rules to be implemented for different matters. For instance, you can specify that certain types of clients with certain activity status are the only allowable clients for a given master matter. These rules were not being considered when matters were being created from the scanning form and hence could result in undesirable results. These validation rules are now added to the scanning form.
- ✚ Added a profile drop down to the matter creation form. This will allow users to profile a matter when they are creating them. This used to be a two step process in the previous versions. We have merely combined them into one step wherever it was possible.
- ✚ Added a favourite button to the task search form that is used to find a task from time cost module.

- ✚ Changed the way email attachments were named. Synergy was using temporary file name generated by the Operating System for each attachment. This was unsafe as there could be two sessions running on the same PC, connected to the same database and importing Emails at the same time. It is theoretically possible (although very unlikely) for the operating system to return an identical file name to STSynergy application running concurrently on the same PC. To avoid this, the attachment file names are constructed from the primary key of the message, the instance handle of the application and a sequence number identifying the attachment number in the list. This should remove any possibility of concurrent sessions messing up each other (as I said very very unlikely but nevertheless theoretically possible). The actual file names on the attachment directory on the server are no longer the temporary file names. STS now uses a similar method to document name the message attachments. They will now be constructed using the UniqueID field from the ZZMSGATT table that references that particular file
- ✚ Allowed help desks to be approver of tasks. Previous versions were only listing the staff type users.
- ✚ Changed the report printed from the tasks tab of the MCC to include the system defined name for matter. It used to display "Matter" all the time. However, this can be renamed on different sites. Please copy the ZZTASKHA.RPT from the CD to your system directory on the server.
- ✚ Added a "Send to" button to the WC messages tab. This button will be visible when you select the help-desk option and a specific help desk is selected. This allows users to move a message to another help-desk if the message has originally been sent to the wrong help desk. Any member of the help-desk could perform this operation. Synergy will not create a new message. It will simply replace the old help-desk with the new one. If the new help-desk is already part of the recipient list, nothing will be done.
- ✚ Fixed error 5 "Invalid procedure call" that was raised when a message was being filed under two matters.
- ✚ Added favourite clients to a Department. Change the display of the favourites to include these for searches and in the WC. Individuals cannot delete these clients from the favourite list. The only way to delete them is from the housekeeping.
- ✚ Allowed the description of the importance table to be changed. Please note that by changing the description, you are not altering the relative order of these entries. The record with the original description of "Critical" will always be treated more important than the records with the original description of "Low" no matter what they are renamed to. Please ensure that when you rename these entries, you rename them appropriately. These entries can be renamed using "Module descriptions" button from the company tab of the housekeeping form.
- ✚ The locate button in the scanning form was not remembering the last directory that was being selected when the form was reset. This is now fixed.
- ✚ Added a new tab to the mail dispatch form that allows users to use the advanced import functionality on predefined set of directories. These directories are stored against the document template. These templates are also amended to have the document author and typist if needed. There is also a security group that determines who can perform this function. Please note that when the documents are imported from a given directory, Synergy creates a lock file called "stslockfile.sts" in that directory. This file is used for concurrency control and will be deleted from the directory upon successful completion of the process. The new tab in the mail dispatch form will list all of the document templates that have been defined for this purpose and the users can pick one from the list. There are facilities to launch, print and import the documents from the list.
- ✚ Added ability to include the matter number in the file specification attached to a document template.



- ✚ Changed the content of the active column of the matter list on CCC. If the matter has a completion date, we display this as “**Inactive**”. For active matters, if the matter has and task on hold we display this as “**On hold**”. All other matters are displayed as “**Active**”.
- ✚ Added a “**Run report**” button to the related matter tab of the MCC. This will allow running an additional data report. The report will contain all of the relevant additional data for all of the matters in the list.
- ✚ Added a “**Bulk communication**” button to the CGE.
- ✚ Added an “**Add from ext. source**” button to the CGE from. This allows users to add entries to the list from an excel file, FoxPro dbf file, Access database or any text file. The user will be prompted to select a sheet or a table if the selected file type is excel or access and there are more than one sheet or table in the file. Synergy expects to find a column called “AccountNo” in the external source.
- ✚ Added a similar button to above to the client tab of the document properties form.
- ✚ Added an option to housekeeping to allow STS to prompt users for inactivation of follow-ups when tasks are being approved. This is located on the Misc tab of the housekeeping form.
- ✚ Added a history tab to MCC. This will list all of the hold-up details for all of the tasks for the selected matter.
- ✚ When compressing attachments for an email, the documents in the resulting zip file contained the original name, “z111111a.doc” for instance. Added an option to the list tab of the house keeping that allows a site to specify a unique naming convention for STS to use. We have allowed name to contain 6 parts. The following fields can be used for this purpose:
 

DR	Document Reference Number
DN	Document Name
PT	Primary Client Title
PA	Primary Client Account Number
RT	Related Client Title
RA	Related Client Account Number

Assuming :

John Smith	Title of the primary client
123456	Account number for John Smith
z111111a.doc	The document name on the document server
Employee Contract	The document name on the document properties

Specifying PT\_PA\_DN means that the file name will be:

John Smith\_123456\_Employee Contract\_z111111a.doc

Please note that the separator is always going to be “\_”. The Windows Operating System does not allow a full path to be longer than 250 characters. Hence STS will limit the file names as needed so that the maximum number of characters does not exceed this limit. The maximum number of characters available can be calculated as follows:

Maximum file name length = 237 – Length of working directory

- ✚ The 13 characters is reserved for ensuring the uniqueness of the file names.
- ✚ Task form allows the message importation from the default inbox. This was only working if enhanced email importation was used. This is fixed now.

- ✚ Changed the template selection form so that as the user types in characters into the template identifier field, the list displays templates with matching external identifiers. To see all of the entries just type \* in this field.
- ✚ Depending on the configuration setting, STS will ask if the user wants to delegate the next task when a parent task is being approved. This was creating a new delegation regardless of whether there was a dormant/active delegation for the next task. STS is changed to check this before adding the new delegation. If Synergy finds that the next task is already delegated (with status of active or dormant), then it will ask the user to see if the user wants to add a new one or update the existing delegation.
- ✚ Fixed a bug in filing template form. When creating a folder template, if you put a client in the client list, it was not saving the client against the filing template. You needed to add two clients to remember the first one. This should be fixed now.
- ✚ Added barcode and sort plan number to the mail dispatch records both for non-mail and mail out documents. The forms have changed to include these fields.
- ✚ Integrated Synergy with POSTman barcode software. This integration will be activated on PC's that have POSTman client installed. The address search button on the client forms will change when Synergy successfully determines that it can work with POSTman. If it cannot load the POSTman, the address search button will remain displayed. Also the mail-out (both document and non-document) is changed to allow search using the POSTman. In all of these cases, if the typed address does not match up an address exactly, Synergy will display all near matches that have been found by POSTman.
- ✚ Added a counter to the house keeping that allows setting a limit for the maximum number of files that are allowed to be in all of the template directories before the nominated security group is notified. The counting will only be done for users that are part of the security group.
- ✚ The workcentre has a new tab that allows people that are part the above security group to monitor how many files are stored in each one of the template importation directories.
- ✚ Fixed an error in the client Synchronisation process. The UniqueID of the ZZSYNREL was not being updated after the successful addition of the record into ZZRELCLI. This would cause a problem when the ActionFlag is set to U or D since the UniqueID of the table will not refer to a valid record in ZZRELCLI
- ✚ Fixed "Subscript out of range" error from the template tab of the workcentre.
- ✚ Added ability to exclude selected entries from the list in the task tab of the workcentre. This option is available from the popup menu that gets displayed by pressing the right mouse button. The selection is not stored in the database. Rather we store that in the memory. Consequently, by logging off or closing STS, and restarting it, you will loose the exclusion list. There is also an option to clear the exclusion list in that popup menu.



***Modification as at release 05.00.11b***

- ⊕ Added ability to compress message attachments into either a ZIP or RAR file from the “EMail clients” button in the “Documents” tab of the MCC. Also allowed EMail to be sent to related clients. Users can now even select the types of clients that the Email should be sent. There are three options for compression, WinZip version 8 or above, WinRAR or Zip from Info-Zip.
  - 1) For WinZip to work, you need WinZip and the command line add-on to be installed on c:\Program files\WinZip directory. The command line add-on is free software that will work with the licensed copies of WinZip. If you have evaluation version, command line add-on will not work.
  - 2) For WinRAR to work, you must install it in c:\Program files\WinZip.
  - 3) Zip.exe will be installed when you install STSynergy on c:\Program files\STSynergy folder. STS will seamlessly work with this freely available tool. At the time writing this release notes, this tool was available for downloaded from <http://www.info-zip.org/pub/infozip/Zip.html>. The zip files created by this tool are compatible with WinZip and WinRAR. The compression is reasonably good; file sizes are within a few percent of the files produced by WinRAR.
- ⊕ Added an option to the house keeping to determine which application to use for compression.

***Modification as at release 05.00.11a***

- ✚ The message attachment directory and message content file is now added to the path relocation. These may need to be relocated when a document server moves from one location to another location.
- ✚ Users have now the ability to specify a priority identifier when using the advanced structured import utility.

### *Modification as at release 05.00.11*

- ✚ The imported messages were not being attached to the internal users when the housekeeping setting was set to do this. This was caused by changing the form from a modal form to a non-modal form. This is now fixed and all imported messages would be correctly attached to the proper client.
- ✚ Added a new template type called “**Matter**” template. This can be used from the matter tab of the CCC and CGE. This allows users to define a set of master matters and create a whole set for a selected or selected clients. Optionally, users can define these templates to be for a specific type of client or they could be used for all types of clients. There is also ability to add additional profiles to matters.
- ✚ Changed the way associations are displayed at the MCC’s related clients tab. When there were multiple associations between the primary client and the related client of the matter, we were showing an association in random. The code is changed so that the current associations are preferred to the historical ones.
- ✚ Scan button is renamed to “**Workflow**” in documents tab of the Workcentre. Since the form allowed importation as well as scan option; we have allowed any user that is defined to be a postmaster to have access to this functionality as well from Workcentre. Consequently, you do not need to set up scan application or scan directory for the users, all they need to be is a postmaster to have access to this function from Workcentre. Access to the form from the CCC and MCC remain as before.
- ✚ The scan form is changed to allow users to locate the document first and then import them. We have added a view button that allows users to launch the document and view it before importing it. Users do not have to load the document first. The form will still ask them to locate the document if they have not done so.
- ✚ Elite tax product (V1.5.1.0) had added a new column to their client table which cause the Synergy-Elite link to fail when creating or editing clients from Synergy. Synergy now caters for this column and link between Elite and Synergy should now be operational again.
- ✚ Add indirect association button to workflow/scan form to help locating associates that are not directly related to the selected client. The indirect association loaded from this form only uses the default association type set at the housekeeping to display the clients. You can use the popup menu to add the client to a list that gets returned to the workflow/scan form.
- ✚ Enforced a minimum message polling interval for user as well as at the system level. As of this version, even if both system and user message polling setting is set to zero, a minimum of 1 minute is enforced.
- ✚ In favourites tab of the workcentre, system automatically filters the inactive clients from displaying when favourite client or client teledex were selected from the drop down. This had a side effect that those clients will always remain in your favourite list without you actually knowing about it. We have added radio buttons that allows users to display either active, inactive or both types. This will help removing those inactive clients from the favourites from time to time.
- ✚ Added ability for users to attach a dispatched document from one client to another client. This will not allow changing the address or name details of the dispatched item. It merely helps users to attach the dispatched documents to correct client in case of duplicated client records. After changing the client, the duplicated client could be deleted. Similar functionality exists for the non-mail documents. All of the changes will be kept in a history table. Obviously, any client that is deleted from the system will be removed from this history table but the name and address details remain in the dispatch table intact. Also a button in the dispatch form will display all of the past clients for the dispatch or non-mail record.

- ✚ Added a security group to control who can change the non-mail and dispatched document clients. If this security group is not set, nobody will be able to do this except the system administrator.
- ✚ Added a new option to the company default to allow Synergy to attempt opening word documents without having to enter the password. This would be useful if you receive protected documents from external source where you would not know the password. Synergy will just attempt to load it but we cannot guarantee whether the document will actually open. This is entirely dependent on how Microsoft word works with protected document.
- ✚ Synergy used to copy the SynWord.dot template file to user's temporary directory before loading it into word as template. This will now be only done if Synergy is running on Terminal services. If synergy is running from a normal PC, the template is loaded from the application directory directly.
- ✚ The right mouse click on the task tab of the MCC displays a pop-up menu. The “**Change task type**” option was always enabled regardless of the security groups used for this operation. This is fixed now.
- ✚ Added a transfer button to the “General” tab of the MCC. This will allow users to create a matter and transfer all of the data from the old matter to the newly created one. Please note that the following validation will be done before a transfer takes place:
  - a) The matter should not be master.
  - b) The new and old matters must be attached to the same client.
  - c) There should not be any invoices attached to the old matter.
  - d) There should be no approved time sheet entries for the old matter.
  - e) If there are additional data attached to either the matter directly or indirectly via the related clients of the matter, these would be deleted. User has to verify deletion before the process continues.
  - f) The user must be authorised to do this operation, that is, it must belong to the security group that controls this operation.
- ✚ Added a security group that controls the above operation. This can be seen from the security tab of the company default.
- ✚ Added ability for query parameters to be passed to crystal reports.
- ✚ Change the button name from “Edit” to “Launch” in the documents tab of the CCC and WC.
- ✚ Displayed “**Reactivate**” button for on-hold tasks in the MCC. Obviously, the user must pass the security checks before the reactive button is enabled.
- ✚ Fixed a bug in automatic adjustment of the task hold-up details. If a task was on hold and the reactivation date had past, STS was displaying the following message box when this task was being approved or reactivated:



- This message box was not giving an option of Yes/No to the user. This is now fixed and the two buttons allow users to either adjust the hold up details.
- ✚ Added some options to advanced document import form that is loaded from the “**Support**” tab of the housekeeping as follows:
    - Creation date of the imported document can now be either a user entered date, creation date of the file or the last modification date of the file.
    - A check box allows users to overwrite the document name even if there is a title in the template.

- A check box allows users to import documents into their personal folders.



When a task was approved, the target date of the subsequent active tasks were not being calculated. STS is changed so that when you approve a task, the next task in line will have its target date set from the system configuration. For this to work, you will need to enforce entry of target dates from company defaults in housekeeping.

### **Modification as at release 05.00.10**

- ✚ In message form, when internal users were added to the **TO** list, they were all were being saved to CC list. This is fixed now.
- ✚ Added an extra check to avoid approving time cost entries to approved matters.
- ✚ Allowed document scanning for approved tasks.
- ✚ In the enhanced scanning, when using replication, all of the matters are now set as related to each other.
- ✚ Fixed a bug in copying the send date and time from outlook when importing messages into synergy.
- ✚ Advanced communication search can now be done by the top tier filing classification as well as the second tier filing classification. Also added ability to search from the contact notes. The maximum length for the note search is about 100 characters.
- ✚ When email merging from the document's tab of the matter control centre, synergy will attach the related clients of the document to the message so that the message can be viewed from these clients as well.
- ✚ When approving tasks, Synergy will now avoid changing the task completion date if it has already been entered.
- ✚ When approving tasks or bulk approving matters, synergy will attempt to reactivate the on-hold tasks automatically. If there are any errors as a result of this process, the user will be warned and given a chance to bail out of the approval process. The user can continue to approve if s/he wishes to.
- ✚ Increased the length of the logon identifier from 10 to 32 characters.
- ✚ Document templates are extended to include structured importation details. The details are stored in the database. The importation details are only used for advanced importation from house keeping and advanced import from the documents tab of the Matter Control Centre. The specification should be stored as {[PPP]EEE(LLL)[SSS]} where:

PPP Is an optional account number prefix

EEE Is the type of information and can be PC (for primary client), RC (for related client), DE for (document reference number) and IG (for ignore)

LLL Is the length of the information

SSS Is the optional account number suffix

The following three lines allow us to import all of the documents within the C:\Statements directory and attach them to the correct clients. Remember that each line is the specification to the corresponding sub-directory level:

Delimiter	Specification	
	Sub-Directory	Files
-	{ }	{ }
-	{[PRO]RC(16)[ ]}_ { }	
-	{[PRO]RC(16)[ ]}_ { }	{[COM]PC(16)[ ]}_ { }_{[EMP]PC(16)[ ]}_ { }_{[IG()]}_{[IG()]}

{ } indicates the there is no requirement to parse the indicated directory or file name where as {[IG()]} indicates that a specific position should be ignored.

- ✚ Buttons were added to the support tab of the housekeeping and document tab of the Matter Control Centre. These buttons allow the above method to be used for mass importation of documents into STS.

***Modification as at release 05.00.09e***

- ✚ Added a new button to the document tab of the matter control centre that allows users to email documents to their primary clients. Various search facility allows users to filter out which documents need to be sent.
- ✚ Also added a new report that allows users to print the tree view from the task tab of the matter control centre. Please copy the ZZTASKHA.Report from the SYSDir on the CD to your installation directory.

### *Modification as at release 05.00.08*

- ✚ Changed server processes to minimise to the taskbar.
- ✚ Created a folder automation server for sites that do not use document security. In these sites, the server's responsibility is to ensure that a new document repository is created when it is required. The time on this server is in minutes rather than seconds as it is not that critical to check folders in seconds.
- ✚ Added library text button to the place task on hold form.
- ✚ Changed the "Reason" button at the jobs tab of the housekeeping to "Hold reasons".
- ✚ Allowed deletion of timesheet entries from the pop-up menu at the timesheet tab of the Workcentre.
- ✚ Added library text button to the follow-up form.
- ✚ When selecting associates, we have added a check box that allows users to select matter related associates. Default is to select non-matter associates.
- ✚ Allowed to select a task when scanning documents for an existing matter. A tree view of the all of the tasks for the matter will be displayed and then the user can select one from the tree. The selected task will be attached to the scanned document.
- ✚ After the completion of the scanning, a message will be sent to the approver of the task as well as all of the people that have been delegated to perform that task. If a task is not selected, then a selection form allows the user scanning the document to select the user that needs to be notified. If no user is selected, then there will be no notification message sent to any one. The message will be attached to the client, the task and will include the document as well.
- ✚ A go to task button is added to the messages tab of the WC. In the above case, this will help users to edit the task attached to the scanned document.
- ✚ Added a setting to the housekeeping that allows site to avoid searching the outlook inbox in order to determine the number of unread emails. When this is turned on, STS will only report the unread email count from the outlook object attributes. This means that if you have unread meeting items in you inbox they will be included in the count.
- ✚ Added an option to the housekeeping that allows to default the radio button option in the matters tab of the CCC. Default is set to "Client is the matter owner".
- ✚ "Client rating" label in the CCC is now configurable. This could be done using the "**Module descriptions**" button from the company tab of the housekeeping form.
- ✚ In making decisions on a workflow item, the reason was mandatory. Made it to default to the description of the answer if it is left blank. In long term, we will be adding facility to specify which answers requires reasons and which one do not.
- ✚ The task and delegation approval has been extended to allow all of the matter approvers the ability to approve the tasks and delegations as well. This is a reasonable assumption since the matter approvers can bulk approve the matter including all of the tasks and delegations. We have also extended the approvers to the individual members of help-desk groups. For example, if one includes a help-desk group as the approver of the matter, then any individual which is part of that group can also approve the matter and task. This can be turned on/off from the company defaults from housekeeping.
- ✚ When a task is approved, the next set of tasks in the workflow gets activated. In many cases the person that is approving the task may want to perform the next set of tasks as well. This could be achieved by adding a delegation to the active sub-tasks after the task has been approved. We have added a configuration setting that allows users to do exactly that. This feature can be turned on/off from company default in Housekeeping.
- ✚ Increased the target days for matter and task types to a 4 digit number.
- ✚ Avoided creating timesheet entries when inspecting messages from the time cost forms.





Word documents that had protected form fields were losing the field values when launched from Synergy. This is now fixed.

### *Modification as at release 05.00.07*

- ✚ Fixed a bug in approving the matter. Tasks approved flag was not being set when the matter was being approved. This is now fixed.
- ✚ Added an enhanced scanning option. This allows users to create clients and matters as they scan the document.
- ✚ Allowed document template to store a master matter identifier and a client type for scanning. These will be used if a template is selected in the enhanced scanning.
- ✚ The address details was not being refreshed when a project type client was selected on the CCC. This is corrected now.
- ✚ On notification from a communication, the signature and the content of the message was being swapped around, that is the signature was on top and the content was after that. This is now in the correct order (content at the top and signature at the bottom).
- ✚ Scan button at the workcentre was being displayed regardless of whether the user had a valid scanning set up. This is corrected now.
- ✚ Added ability to place tasks on hold. This can be done from the “**Task**” tab of the “**Workcentre**”. The button will only be available if you select the “**Tasks assigned to me**” option from the dropdown. The person that is placing a task on hold must be the approver of the task. The details are kept in a history table that allows users to see how long a task has been on hold.
- ✚ Added an option to housekeeping that allows users to decide whether STSynergy should automatically adjust the hold-up details when a task is being reactivated.
- ✚ Added a follow-up type to the housekeeping (List items tab) that allows users to specify what type of follow-up should be created when a task is being placed on hold.
- ✚ Added a default reason for tasks being held up. These reasons are stored on a separate table and needs to be set up before hand. To do this, you need to go to the “**Matters**” tab of the housekeeping and use the “**Reason**” button.
- ✚ Added the ability to exclude clients from synchronisation process. At the “**Miscellaneous**” tab of the company default form, there is an option that allows you to define whether to exclude the clients from client synchronisation process. You can use this to avoid having unwanted data to be brought back into STSynergy by synchronisation process. Be aware that if you decide to build an exclusion list, the synchronisation process will task longer to complete. Only client’s account number is considered from the exclusion list. Remember that all of the account number from the history table for that client will also be added into the exclusion list.
- ✚ Added a button to the client tab of the housekeeping that allows to clean the client exclusion list. This would be useful if at some future point, one decides to allow previously excluded clients to be brought into STSynergy. Only system administrator have access to this functionality.
- ✚ Changed the client synchronisation process to consider the exclusion list if required.
- ✚ Changed the client synchronisation process to consider the “**PostalBusi**” flag from the ZZSYNCLI table. If this flag is set to true, the synchronisation code will copy the postal address details to residential address.
- ✚ A double click on the indirect association form will load the new client in the CCC.
- ✚ Added a button to the support tab of Housekeeping that allows the Avanteos WIP to be imported from outlook. This button and associated code will be removed in the next release.
- ✚ Added a check box to the matter selection form that allows users to specify full replication of the decision nodes when copying masters to other masters.

### *Modification as at release 05.00.06*

- ✚ Fixed a bug in setting the email attachment directory. The user specific directory was not being appended to the base attachment directory.
- ✚ Fixed the ZZITMINV report. The start time, end time and duration was using the floating point operations rather than the integer operation. Please copy the new report to your System Directory. Also added the comment field to the report.
- ✚ Added ability to synchronise client association using the Client Synchronisation Process. Also changed the Client Synchronisation process to send an internal message to a specific user when operation is complete. The log file will be attached to this email.
- ✚ Allowed single logon for STSynergy users. For each company, a site administrator can specify if a particular company should use domain logon ids. This will allow users to logon into Synergy without having to enter a password. For this to work, the logon id in Synergy must match domain user id. Remember that logon ids in Synergy are a maximum of 10 character long.
- ✚ When using a single logon, one can switch to a different user by clicking the switch user from the toolbar. Obviously, the password of the particular user should be entered correctly before user is successfully changed.
- ✚ Synergy allows a replacement symbol to be used for insertion of documents into other documents. However, all documents were treated identically, that is an image file was treated the same as a word file. This had the adverse affect that when inserting an image file into a document, the actual binary data were inserted rather than the image. This was due to the fact that there was no distinction between image files and other files in STSynergy, they were all documents. We have added a setting in the housekeeping that allows sites to specify which document extensions should be treated as image file. The following file extensions have been set as the default as at this version:  
eps fpx wpg tif tiff pct pict mix cgm cdr pcx pcd pcz wmz emz gif gfa bmp dib rle  
bmz png jpg jpeg jfif jpe wmf emf  
If we have not catered for an image file type that you use, please add the 3 or 4 character file extension to the list. Please ensure that the extensions are separated by a space. We have made provisions for addition of over 200 file extensions. If this is not enough, please let us know and we will increase the limit to cater for your needs.
- ✚ In some cases users may want to send a message with a specific sender name and email address. This was not possible in STSynergy until now. We have amended message templates which allows a specific Exchange mailbox name to be added to the template. When this is done, any message created using that template will carry the specified user account on the email. This is equivalent to allowing a **From** field in the outlook's email form.
- ✚ Changed housekeeping so that when the filing template button is pushed, the user is allowed to select a template type. Absence of this option made it difficult to locate a specific template when one was looking for it.
- ✚ PDF conversion is now made available on all of the forms with copy document button, ie CCC, WC, DCC and task form. Also allowed users to wait for the PDF converter to finish if it is busy converting another document. Users still have the option of bailing out if they want to.
- ✚ Added a popup menu for bulk selection of users in user select form when it is in multi-select mode.
- ✚ Allowed communication template to have internal staff as email recipients for automated notification. This will help users avoid having to select users if some staff members had to be notified whenever a specific type of communication is logged in the system.
- ✚ Allowed delegations to be claimed when they are edited from anywhere (eg MCC, WC). The user must confirm before the delegation is claimed successfully.

- ✚ Fixed a display issue in the WC task tab. When displaying tasks delegated to the user, not all of those delegations delegated to user's help-desk were being displayed. This should be OK now.
- ✚ Allowed importation of messages from within a task as well as the messages tab of the CCC. Obviously when the importation started from these forms, the importation form is displayed as modal form, that is the user must complete the message importation before s/he can do anything else. When invoked from CCC, all imported messages are linked to the client. Similarly, when invoked from the task form, all messages are linked to the task.
- ✚ Changed the invoice documents to have the invoice number as the document reference rather than the reference number of the invoice. This is much more useful when searching for the invoice document as it uniquely determines an invoice document.
- ✚ Added an advance search button to the communication tab of the WC. This will allow advance search for any communication in the database. When this option is used, the communication date field will be disabled as it is no longer relevant to the search criteria. Also changed the list box to sortable list view and added the communication date in case advance search is used.
- ✚ Allowed creation of new matters from the create message form (popup menu from the task control). The user can create a new matter and select a task within that matter to attach the message to.
- ✚ Improved user interface for the creation of public holidays.
- ✚ Fixed a possible oversight in calculation of target date using business days. The calculation may incorrectly add extra days if the public holiday falls on a weekend. Unlikely in Australia but may happen in general.
- ✚ None mail-merge word documents were not displaying the client name on the title bar. Changed the document launching process to do this regardless of whether the word document has mail merge or not.
- ✚ Fixed the error in approving tasks.
- ✚ Fixed the invalid procedure call error from mail merge. This was due to a invalid field name being passed for update purpose.
- ✚ we now display the client dispatch notes when creating a non-document mail item. This only for display purpose and system does not snapshot the details along with the mail item.
- ✚ Fixed an error in the invoice creation form. It was not saving the information on the security tab if that is the only thing that one has altered.
- ✚ Added a tree view for displaying indirect associations at the associations tab of the CCC.
- ✚ Added a replace button to the task tab of the diary creation form. This will allow users to search for matters and tasks belonging to the client of the selected task from the list. This will delete the selected task and add the newly selected task to the list.
- ✚ Made the association optional in the housekeeping.
- ✚ STS was insisting on a number or volume number for generation of barcodes at the validation stage. This was delayed to the actual barcode generation stage.
- ✚ Made some changes to timecost reports as well as adding new ones. Please copy the all of the reports from the CD to your system directory (please be careful not overwrite those reports that you have altered yourselves). Also renamed some reports as follows:

**Old name**

Billing by Department  
 Client Billing  
 Work In Progress for All Staff

**New name**

Total Fees Raised by Department  
 Client Fees Raised by Department  
 Billable Time

***Modification as at release 05.00.05***

- ✚ Added the required fields for the creation of non-document mail items.
- ✚ Added a new report for printing the costing details from the unbilled time tab of the Matter Control Centre. Please copy the report ZZTMECST.RPT from the CD to your system directory where other Synergy report reside.
- ✚ Fixed a bug in the client type form in Housekeeping.
- ✚ More character translation has been added to QuickBooks interface. Now characters like é, í, î and many more can be used in the client details and these will be safely transferred to QuickBooks software. Please let us know if you have noticed any other printable characters that is still causing failure and we will endeavour to add that to our translation table.

### **Modification as at release 05.00.04**

- ✚ Fixed the (Read-Only) appearing twice in the title bar of word documents. SynWord8.dot needs to be deleted from the working directory.
- ✚ Copying to briefcase process is changed. It now allows users to navigate to a folder if they want to copy it to a different location. The initial directory loaded is the user's briefcase folder if it exists.
- ✚ Added importance to matters similar to documents. The matter tab of the Workcentre is changed to display the importance.
- ✚ The list box in the matter tab of the Workcentre is now have check boxes. This will allow users to approve or submit multiple matters at the same time. Use right mouse click to select/deselect the entries in bulk.
- ✚ Added matter importance to the matter search screen.
- ✚ Added an option for target days. This option allows users to specify whether calendar days or working days should be used for calculation of matter and task target days. For working days, the working days will be determined from the housekeeping setting. Public holidays will be determined from the public holidays setting in the housekeeping.
- ✚ Added an email button to the documents tab of the CCC, MCC, WC, DCC, JCC and task form. This will allow users to create an email from the selected documents.
- ✚ Address source's account number is now available for mail merge in a word document. The new field is called "**AdrSrcAcct**".
- ✚ Allowed users to specify which templates are used in their organisation.
- ✚ Added some more details to the mail dispatch form and non-document mail item. New details relate to delivery methods. It allows users to specify which delivery company (client) was used for dispatch. It also allows users to record the receipt details if the mail delivery requires a receipt.
- ✚ Fixed the invoice report. The table creation step was generating error (-7711) on some PCs. This happened to be related to  
ZZINVOICE.UniqueID = "000000000000"  
line in the SQL statement. I do not see any reason why this should generate any errors but somehow the FoxPro driver does not like this test. By changing it to  
ZZTMESUM.UniqueID = "000000000000".  
it seems to work.
- ✚ Added ability to provide a list for additional data columns. Please note that list items cannot be logical or memo fields. All other types of additional data columns can have a list. The list values cannot be deleted. However they can be activated or inactivated at any time. When adding new additional data values, only the active list values will be displayed. When editing an existing additional data value, active values as well as the current value of the column will be displayed. For queries, all list values will be displayed.
- ✚ When creating matters, all of the task follow-ups are copied to the newly created tasks.. The follow-ups for all active tasks will start from the matter creation date. When there are multiple follow-ups per task, these are ordered by the start date. The first follow-up in the group starts from the creation date. The start date for subsequent follow-ups are calculated as follows:
  - 1) If the start date for the current follow-up and the start date for the previous follow-up differ in the day part (i.e. 1/1/2004 and 6/1/2004 or 1/1/2004 23/11/2005), then take the difference of the two start dates in days and add it to the start date of the last follow-up that we created.
  - 2) If the start date for the current follow-up and the start date for the previous follow-up differ in the month part (i.e. 1/3/2004 and 1/7/2004 or 1/1/2004 1/11/2005), then take the difference of the two start dates in months and add it to the start date of the last follow-up that we created.
  - 3) Otherwise the start dates must differ in the year part (i.e. 1/1/2004 and 1/1/2005). In this case take the difference of the two start dates in years and add it to the start date of the last follow-up that we created.The start and due date for all dormant follow-ups are set to 31/12/9999 and the last contact date has a snapshot of the start date of the follow-up it was base on. When the parent of a

dormant task is approved, the follow-ups with start date of 31/12/9999 will go through a similar process as described before. In this instance, the follow-ups are ordered by the last contact date and the dates are calculated from this date.

- ✚ Added an “**Add comm.**” button to the favourites tab of the WC. This button will be available for client teledex as well as the favourite clients options.
- ✚ Added importance to the document search screen.
- ✚ Removed the finalised checkboxes and added these two options to a list.
- ✚ Similarly for dispatch option, removed these options and added them to a list.
- ✚ There was a display problem in displaying the follow-ups for master matters. Since master matter may not have clients, none of the follow-up were displaying. This is now fixed and the list entry for these follow-ups will display “**No client**” as the client title. The account number will be blank.
- ✚ Added ability to process document meta-data on importation from the post master. The entire meta-data must be in the Keywords section of the file properties. The meta-data must conform to the following syntax:

**PRIORITY=Numeric priority number for this document**

**AUTHORID=External identifier of the author for this document**

**TYPISTID=External identifier of the typist for this document**

**IMPORTID=Importance name for this document**

**DOCEXTID=External identifier for the document**

**CLIENTID=Client account number for this document**

**CLIREFID=Client reference number for this document**

**MATTERID=Matter number for this document**

**MASTERID=Master matter number if a new matter to be created**

**MATREFID=Matter reference number for this document**

**KEYWORDS=Keywords for this document**

**FILINGID=Filing classification external identifier for this document**

**SECGRPID=Security group external identifier for this document**

**USEREXID=Security user external identifier for this document**

**DOCTITLE= Name for the document**

**COMMENTS= Comments for the document**

All of these are optional. A carriage return linefeed combination must be at the end of each line. Parsing will end for current line when a carriage return linefeed is detected.

The comments can contain carriage return linefeed. To avoid any errors, place this at the end of the meta-data.

MASTERID is mutually exclusive with MATTERID and MATREFID. If MASTERID exists, STSynergy will ignore the other two. In this case a new matter is created and the imported document will be attached to the first task in that matter. A matter will only be created if there is at least one client. The new matter will have the first client as the primary client and the others as related clients.

All of the clients will be considered as primary clients.

- ✚ Added ability to add multiple document keywords at the same time rather than one at a time.
- ✚ STViewer.exe now loads the reports with correct page orientation.
- ✚ Fixed the spelling error “Hight” for document and matter importance.
- ✚ Fixed the system crash when an unauthorised user tries to access a communication. I was planning to do this everywhere that we have security but I guess people do not share my sentiments of penalties for unauthorised access.
- ✚ Added a report button to additional data tab of the CCC and MCC. This allows any additional data report to be loaded for the selected client or matter. The user will get to select which report to run first.
- ✚ When selecting a client in the favourites tab of the WC, the text box is now populated with some information. Also the list box shows the telephone numbers instead of the business name and activity status.



- ✚ The costing form (can be loaded from the matter tab of the CCC or from the invoices tab of the WC) now displays the matter number in the list. Also added a go to matter button to this form. The form will be unloaded when selecting a matter to go to.
- ✚ In the task tab of the WC, when selecting tasks delegated to me, we now display all of the tasks that are delegated to any of the users help desk. For example if a task is delegated to support help desk and person X is part of this help desk, when s/he looks at his/her WC, this task will be list. There is also a claim button that allows users to claim these delegation.
- ✚ Added the target date to the list box in the task tab of the WC.
- ✚ Provided an option in the housekeeping to set the desired option for the documents tab of the CCC. The default is currently "documents in progress".
- ✚ When importing messages from Outlook, some users requested to set the send date/time from the imported message. We have added a new option in housekeeping that allows users to do this. However, in some cases depending on the send date/time of the imported messages, they may be mixed in the WC with other messages. For example, if you have two messages on the WC sent on 1/12/2004 and 3/12/2004 and then you import a message from Outlook sent on 2/12/2004, using this option will display the imported message between the other two messages. However, STS currently display all of them at the top of the list as it uses the current date and time as the send date/time.
- ✚ Integrated STS with **AFPL Ghostscript 8.14** and **RedMon 1.07** to provide a free PDF conversion solution. These are both free software that could be downloaded from Web. We have also integrated with PDF995 suite of products. Although PDF995 is an inexpensive product, nevertheless, if one can do something for free why pay. In addition to that, our tests have demonstrated much faster conversion process using Ghostscript/RedMon combination than PDF995.

To enable PDF conversion in STS, please download the latest GhostScript/RedMon software from <http://www.cs.wisc.edu/~ghost/> and once done contact us for directions for setting the PDF printer.

The PDF files created using AFPL GhostScript produces a fully encrypted pdf file. The only thing one can do with the pdf file is to print it. Everything else is disabled, that is you cannot grab images or text from the pdf file.

To create protected PDF files using PDF995 suite of products, you needs to use the PDF995's encryption module (Signature995). However, we have not integrated this product with STS yet. Please contact us if you want to pay for something that you can get for free and we will look into integrating with Signature995.

We are providing a free solution and do not claim to have the fastest and the best method of PDF conversion. If our approach is unsatisfactory to your organisation's need, please feel free to use any other means that is appropriate for your organisation.

- ✚ Fixed the processing of the log entires for invoices. We now check the invoice identifier from the log table. If the invoice identifier does not exist any more, then we delete the log entry from the log table.
- ✚ Fixed the approval of the delegation when matter is being approved. For SQL server platforms, the delegation were left as un approved when one approves the matter. This only appear to be a problem on SQL server platforms. All Access and Fox pro based system should be OK.
- ✚ Added an option to housekeeping to disable the message box that appears at the end of the search in client/matter/document search screen. Default is to display the message.



### *Modification as at release 05.00.03*

- ✚ Added and inactive flag to the trading name table ZZTRDNAM. Also changed the display of the trading names to include this flag in the list.
- ✚ Added ability to customise the sliding bar and toolbar. Users can now add any shortcut to the sliding bar. However, this is controlled by a setting at the housekeeping as well as a security group that determines who are allowed to create shortcuts. Also the toolbar can be customised so that some tools are not displayed on the toolbar and home screen. However, this does not mean that users cannot access these control centres. They are still available from the file menu.
- ✚ Used sortable list for displaying users and trading names.
- ✚ Allowed the home screen background colour, primary colour and alternate colour for interface elements to be changed in the terminal services environment. The default is white and bright yellow for primary and alternate colours and a shade of green for the home screen. The primary and alternate colours can be changed for none-terminal server usage of the system as well. However, the home screen background cannot be changed for none-terminal server usage.
- ✚ Populated TGGuid field of the Elite tax client table with a GUID when new clients are added.
- ✚ Integrated STS with companies that provide online SMS (eg Telstra, Redcoal etc). To enable SMS from Synergy, you need to have an account with a company that provide online SMS (eg Telstra). Enter their online SMS server name at company defaults (onlinesms.telstra.com) and specify a maximum message length. That is all you need to do. By default everybody can send SMS message. However, this can be controlled by a security group from house keeping. Synergy's message infrastructure will be used for sending SMS. The recipients address will be formatted as **MobileNumber@OnlineServerName**. For example, if you are using Online SMS service from Telstra and trying to send an SMS to mobile number 0407084906, then the email address of the recipient will be **0407084906@ onlinesms.telstra.com**. This integration have been tested with Telstra and Redcoal the above mentioned
- ✚ Added the Work In Progress amount (WIP amount) to staff productivity report. The ZZSTFPRD.RPT must be copied from the CD to the location where this report resides (usually Synergy\SysDir directory).
- ✚ Added a new "**All**" entry to the classification drop downs in the Reports Gallery. This will allow user to look at all of the report on a specific category as well as allowing them to look at all of the user defined or additional data reports.
- ✚ Fixed a bug in calculation of reminders in appointment form. The reminders should work properly now. Also added a text field that displays the notification date and time for the appointment in the appointment form.
- ✚ Added an **Edit** button to the additional data tab of the Matter and Client search forms.
- ✚ Added ability to turn time tracking (time cost, timesheet) on/off for each individual user. They are all on by default. Turning it on/off from housekeeping will prompt you to decide whether to apply the housekeeping setting to all users or not. This will help in cases where a site wants to enable/disable time tracking option for a few users. For example, if you want to enable time cost for a couple of users, first disable it from housekeeping and allow STS to apply the changes to all users. Then go back and enable it again, this time say no when asked to apply changes to the users. Then go to each user that require the time tracking and use the time tracking check box for enabling it.
- ✚ Changed the folder creation form. It now sets the department to be the selected client's department.
- ✚ Added a print button to the follow-up tab of the work centre. A new report (ZZANNIVR.RPT) is placed in the SYS\_DIR. Please copy this to your SYS\_DIR directory on the server.

- ✚ Added a print button to the matter search screen. A new report (ZZMATTER.RPT) is placed in the SYS\_DIR. Please copy this to your SYS\_DIR directory on the server.
- ✚ Changed the RMS tab at the Workcentre so that it displays the folders that have been checked out to the logged use's location, that is if the logged user is linked to a RMS location, then any folder that is check out to the logged user's location will be displayed at the Workcentre. One can still use thee advance search to search for folders using various criteria.
- ✚ Added a "**Backward - Forward**" button to the matter and client control centre. As clients/matters are displayed, they are added to the list and this button just displays the data from this list. The list is destroyed when the control centres are closed.
- ✚ Fixed a bug in the RMS search screen. Queries containing the container reference number was generating errors and was not displaying the result. This is fixed now.
- ✚ Added an option to the company default that allows sites to specify whether to add the name of the primary client to the title bar of a word document when launching. This is turned off by default. When this option is active, the title bar of documents launched from locations where client is unknown (eg document control centre, work centre etc) will contain the name of a randomly selected primary client.

*Modification as at release 05.00.02*

- ✚ Added three new reports: **Work in progress for a client**, **Client Billing**, and **Billing by Department**. The reports ZZWIPSCL.RPT, ZZINVCLIRPT and ZZINVDEP.RPT must be copied from the CD to the system directory where other system reports exist.
- ✚ Added an expense GL/Service code to the disbursement category and type. This will allow further automation of the disbursement creation.
- ✚ Changed the disbursement form. It now checks both the revenue and expense code allocation when invoicing so that the total amount allocated to various GL/Service codes matches the total disbursement cost. Also made the revenue tab hidden when adding a disbursement. Consequently, if the disbursement is linked to a GL/Service code that is taxable, one may see a tax amount on the general tab while the revenue tab is invisible.
- ✚ Also ensured that the allocation of total fee matches those on the accounting tab, that is the total allocated to the various GL/Service codes matches that of the total fee.
- ✚ The users should now be notified of the messages awaiting approval. There was a error is the SQL statement that made this not work on last version.
- ✚ Follow-ups in the CCC is now sorted based on the due date rather than the start date.
- ✚ Added an option that allows sites to determine which address should be displayed as default in the general tab of the CCC, and the address type in the client search screen. This can also be set per Department.
- ✚ Fixed a bug in including disbursements for an invoice.
- ✚ Fixed a bug in filing template form. It was not saving all of the clients. It is fixed now.
- ✚ Added ability to create templates for clients. Also changed the process so that users can pick a template before a client is added. Profiles, associations and Department,
- ✚ Added the concept of importance to documents. There are currently 5 levels of importance, **Low, Normal, Medium, High, Critical** with increasing order of importance. In document properties, if you select anything from the importance combo box apart from **None**, that document is considered having some level of importance. In CCC, a new option has been added to the document types in the documents tab called **all important documents**. When this option is selected all of the documents that have some level of importance is displayed based on their importance level, that is critical ones are at the top down to documents with low level of importance. Remember that selecting Normal still places some importance to the document as opposed to None which says that this document must be treated like other documents. All documents with the same importance level will be sorted based on date or name as selected on the tab.
- ✚ Added ability to have a numeric number for master documents. This numeric value could be used to generate a reference number for any document based on that master. Each master document has its own number, hence it is possible to have duplicate reference numbers if documents created from different master.
- ✚ Allowed sites to define a third party application for barcode scanning. Synergy allows you to define the full application path, the switches before and after the file name as well as file name. In barcode scanning, Synergy will examine these setting to see if the site is using a third part application for barcode scanning. If it is set, then the application will be loaded and Synergy will wait until the application is terminated. After that, the content of the file will be read and placed in the txt field and the rest of the process remains identical.
- ✚ Fixed the message form so that the selected client or the first client is passed to task search form.
- ✚ Adding users to performance tab now considers the company setting for including or excluding inactive users.
- ✚ Added a view message button to the message tab of the task form.

- ✚ Allowed the additional data columns to be inactivated. Once inactivated, the data will not be collected when adding new ones. However, the existing data remains intact. Please note that the mandatory columns can never be made inactive. To achieve this, you would have to make the column optional.
- ✚ Added a new drop down combo box to the grapevine tab of the WC. This will allow users to display either all, document or communication type items. When all or document option is selected the briefcase icon could be used to copy the document to briefcase directory. Normal security checks will be done as usual.
- ✚ Fixed a bug in setting the start date of the tasks when they are created. If one enforces the entry of the target date, then the target date was incorrectly put in the start date of the task. This is now fixed.
- ✚ Set the icon on the sliding bar for Home screen.

### **Modification as at release 05.00.01**

- ✚ Fixed the deletion problem in the trusted users tab of the user form. It was not deleting the correct trusted user.
- ✚ Added a view message button to the messages tab of the MCC.
- ✚ Added an option to the housekeeping that allows sites to give read only access to secured follow-ups.
- ✚ Added security group and security users to clients. For now these are only available if the client is linked to a tax product. However, this could be expanded in the very near future to cover other areas.
- ✚ Changed the way client applications create the document server directory when directory automation is used. Currently, the client application attempts to lock a table and if it fails then it just exits the document server creation process. This is changed so that when the directory is full, the first client application that detects this, will create the directory and set the database with the new directory. Anybody attempting to lock the table while the directory is being created, will wait until the directory is created and then uses the new value for document server. The client application will detect the end of the directory creation process by the fact that they can lock the table. At that point the first application must have created the directory and released the lock. This should hopefully stop creation of redundant directories when document security is not in place.
- ✚ Changed mapping from STS to Elite Tax System. For company, association, partnership, superfund and trust, STS maps title in ZZCLIENT to the Surname field in the Elite. It does not synchronise first name, other name, gender and date of birth for these types of clients. For all other types of clients, the mapping is as before.
- ✚ Added a new option at Department level that allows sites to define the default reason for client id change. This will help Departments to set this based on their own requirements. The Client Synchronisation still picks up this from the company defaults rather than the Department setting as the System Administrator does not belong to any department. **Please remember that if you are importing clients, the reason for id change set for your Department will be used for all of the clients that are being imported.**
- ✚ Changed processing of the RMS files via the barcode reader. A new form has been developed to allow users to correct the barcode scanner information if they are incorrect before updating the file locations. A list view displays all of the successfully processed data and allows user to update the location on demand.
- ✚ Added a two tiered disbursement type. This allows sites to define types of expenses and link them to a GL/Service code and supplier. It also allows them to specify unit price and quantities. Using all of these will help to set up the disbursement details automatically.
- ✚ Added a mapping facility for automation of tax entires for unbilled time. Users can now map any combination of matter type, task type and user to a specific GL/Service code. When adding unbilled time to an invoice, Synergy will use this mapping to decide which GL/Service code to use for generation of the tax lines. The matching is done in the following order:
  - 1) Matter type, task type and user
  - 2) Matter type and task type
  - 3) Matter type and user
  - 4) Task type and user
  - 5) Matter type
  - 6) Task type
  - 7) User
- ✚ Displayed BAS, ELS and FBT details for a client from the Elite Tax system.
- ✚ Added a costing details option for the invoices in the Workcentre.

- ✚ Added two combo boxes to the disbursement tab of the MCC. The default is to show all disbursements.
- ✚ Changed the address mapping between Elite and STS as follows:

Elite Client type	Postal	Residential	Other	Registered
Individual	Postal Address	Home Address	Business Address	Registered Address
Any other type	Postal Address	Business Address	No mapping	Registered Address

***Modification as at release 05.00.00***

- ⊕ Integrated Synergy with Tax System. The first system used for this integration is Elite Tax system. The following functions are available:
  - ⊕ Importation, synchronisation and linking from the tax product. When linking, the user has the ability to match based on Taxf File number (TFN column in CLIENT\_DETAILS table) or the Account number (USR\_CLI\_ID column in CLIENT\_DETAILS table). The matching columns in STSynergy is TaxFileNo and AccountNo columns respectively in ZZCLIENT table.
  - ⊕ Creation and synchronisation of the client details in the Tax system from Synergy.
  - ⊕ Client search screen allows for users to search fro all clients linked to a tax product.
  - ⊕ Added a tax tab to CCC. Synergy displays all of the tax return records from CLIENT\_RETURNS in the Elite system. It displays the year, taxable income, refund/payment amount, lodgement date, validation date and validation file name.
- ⊕ Fixed a bug in checking in from the briefcase directory.
- ⊕ Fixed a bug in importing data from accounting database. Synergy was failing to complete the process if it found that the title of the client and the business name was identical. This was happening when records was being added to ZZCLIKA table. It is fixed now.
- ⊕ Changed the copy function for RMS folders. The client, matter, user responsible for the file, the department and filing classification are now copied to the new volume. Also changed barcode generation so that when a new volume is created, the volume number is incremented rather than the file number if it exists. If the volume number does not exist, then original format is used for Barcode generation.
- ⊕ Added a print button to the results tab of the Client Search Screen so that the result can be printed. The report that gets loaded is the same report as the one in the Client Group Enquiry.
- ⊕ When users were creating a fax from within a task, the task and client was not getting added to the fax. Synergy now adds the task and the client of the matter when fax created from within a task.

***Modification as at release 04.04.12a***

- ⊕ It looks like this setting EnableSelectDistinctRecords property to True is causing a problem in Synergy Crystal Report Viewer (STViewer.Exe). This only occurs in the Crystal Reports 9 Environment. Removed it so that the reports can be viewed in Crystal Reports 9 Environment.
- ⊕ Changed the logon process in Synergy Crystal Report Viewer (STViewer.Exe) so that the application attempts to logon to the database in the main report as well as all of the subreports..



### *Modification as at release 04.04.12*

- ✚ Allowed to set target days for each task type.
- ✚ Fixed a bug in the schedule tab of the Calendar Control Centre. The previous menu option was not calculating the start date correctly.
- ✚ Moved Teledex tab information to the Favourites tab in the Workcentre.
- ✚ In CCC, profile tab, follow-ups list were displaying the entry date. This is changed to display the due date or next follow-up date.
- ✚ For follow-up, there are two sets of users. The first set are those that are responsible to take action when follow-up is due. The second set (escalated users) are the ones that get notified when the follow-up is not actioned by the due date. The follow-up types allows you to set users for the second group (escalated users) but did not allow you to set default user for actioning the follow-up. On this version we have added this facility. All of the users in the list as well as the logged user will be added to the follow-up.
- ✚ For recurring follow-ups, one can enter an amount. However, not all recurring follow-ups should allow entry of this amount. We have added a check box at the follow-up type level to allow sites to lock the amount field for the required recurring follow-ups.
- ✚ Fixed an error in deletion of security groups.
- ✚ When matters being approved, Synergy was changing the completion date of all of the tasks regardless of whether it did have a completion date or not. This is now changed. The completion date of the task will remain intact if they are entered. However, those without completion date will be stamped with the date. Similarly for delegations. Lodgement date (Submission date) of the task is also set to be the same as the approval date if it is blank.
- ✚ Fixed a bug in the approval of the matters. If the time cost system was turned off, Synergy was not letting the matter to be approved. This is fixed now.
- ✚ The appointment form was displaying matter details rather than the user in the attendee tab because of incorrect context. This is fixed now.
- ✚ Added a create matter button to the task tab of the appointment form.
- ✚ Added a create matter button to the task tab of the communication form.
- ✚ Added a notify button to the communication form that allows user to send a message with the content of the communication to internal users. The security groups and users are checked to ensure that all of the recipients of the message are allowed to read the content. Those that do not have access to communication will not receive the message.
- ✚ Added an “**Add follow-up**” option to the popup menu of diary system. This is option will only be available for existing appointments. This option will be available from diary tab everywhere.
- ✚ Express ClickYes integration was not working properly. The correct window handle was not being returned from the OS. Changed the function definition to fix this. It should be working now.
- ✚ When adding email addresses to a message, a new option from the dropdown allows users to add contacts from their contacts book in Outlook. Outlook distribution lists will be resolved immediately. Do not include entries from the Exchange. The entries should only be added from the personal contact book. Similar option is available when creating a distribution list within STSynergy.
- ✚ Fixed a bug in chronology tab of the CCC and MCC. It was ignoring the limit checkbox. This is fixed now.
- ✚ Added the chronology report. Ensure that Crystal Report file is copied from the CD to the directory where the other Synergy reports reside on your server.
- ✚ Additional data reports from report gallery were not running catalogued reports in a document secured environment when the server was not running. This is fixed as synergy should not go through document security for catalogued documents.

- ✚ Fixed a bug in approval process of the matter. When Synergy needs to enforce entry of the approval date, a date form gets displayed. However, if the user selects the exit button rather than the save button, it continues and approves the matter. From now on, selecting exit will not approve the matter.
- ✚ Added three new buttons to the document tab of the Task form for copying, faxing and sending documents to briefcase.
- ✚ Fixed a bug in mail merge. Microsoft has fixed the date bug that existed in Office XP in Office 2003. Changed Synergy so that it will not apply the date fix work around if it encounters Office 2003 and above.

*Modification as at release 04.04.11a*

- ✚ Start date and time of the manual time cost entries can now be changed when adding new ones. When editing existing ones, these are still locked.
- ✚ Added ability to add matters to inactive clients. This is only possible if the housekeeping option is turned on. The bulk matter creation routines have been amended to reflect this option from CGE. Also the matter form is changed to reflect this change. For an existing matter, you can only change the client of the matter to an inactive client if there is no un-invoiced items for the matter.
- ✚ Added an extra check when time cost entries are approved. When approving time cost entries, the client must be active.
- ✚ Allowed system administrator to change the reason for client id change on existing data.
- ✚ Added a button to CCC, MCC and WC that allows users to submit, approve or unapproved the matter without having to load the matter form.
- ✚ Added integration with Express ClickYes for bypassing the Microsoft Outlook security guard. If installed, Synergy, enables the application before sending the message and disables it after the operation.
- ✚ For sites where filling classifications, association types and other data types are departmentalised, Synergy used to default to staff member's department. In cases where this department does not have any data attached to it, users would not see anything in the list. We now changed so that in these cases, we default to all departments so that everything is displayed.
- ✚ Displayed the build number to the login form's title bar.

***Modification as at release 04.04.11***

- ⊕ Added ability to attach tasks to clients. As clients are added to the task, they are added to the matter as related clients. The primary client of the matter can never be added to the task as a client. When related clients are removed from the matter, it gets removed from all of the tasks as well. However, a client removed from the task will not cause it to be removed from the matter.
- ⊕ Added ability to see the clients for the task in the task tab of the MCC.
- ⊕ Added ability to filter out the inactive users when maintaining users from the housekeeping. This should keep the list to a manageable size.
- ⊕ Added ability to filter out the inactive address dependents from the address dependent list in CCC.
- ⊕ Added ability to filter out the inactive billing dependents from the billing dependent list in CCC.

***Modification as at release 04.04.10e***

- ✚ Fixed a bug in calendar form. When creating an appointment from client or matter, after clicking the out of office check box, the client details were not being displayed. This is fixed now.
- ✚ Added ability to copy a Records Management folder. This is available from Records Management tabs in CCC, MCC and WC.
- ✚ The pop-up menu for RMS list box was getting too long. Arranged it into menu and sub-menu so that the length becomes manageable.
- ✚ Added ability to search by creation, expiry, destruction, archive and entry date of Records Management folders.
- ✚ Fixed an error in company defaults. The Association item in the defaults tab was incorrectly showing as optional. This item is a mandatory field at the database level and must be set up with an association type.

***Modification as at release 04.04.10d***

- ✚ Fixed the final error in sending facsimile. This was related to the documents being checked out.
- ✚ Fixed the more information button so that when Null DateEntry was passed, it displayed a blank in the entry date field.

### *Modification as at release 04.04.10c*

- ✚ Added ability to set the person responsible for the Records Management Folders.
- ✚ From time to time we release new builds of STSynergy. These builds generally contains new features that might not have required a database change. For example, for **03.05.01**, we might have had 3 builds **03.05.01a**, **03.05.01b** and **03.05.01c**. When **03.05.01c** is released, it would be beneficial to warn users that are running **03.05.01a** or **03.05.01b** that newer application release exists and leave it to them to decide when they want to upgrade the PC with the latest build. This is just an informational message and will not stop users from logging on.
- ✚ Added an option in the activity tab of the ad-hoc enquiry form that allows users to specify a search for current activity status only rather than the history. This is set by default, that is the search will always search the current activity status rather than the history. To search the client activity history, just turn this off.

***Modification as at release 04.04.10b***

- ✚ Fixed an error in adding client records. When checking for duplicate clients, the other names were spelt incorrectly causing SQLServer or Access to generate error. This is fixed now.
- ✚ Fixed an error in filing templates. The relationship at the database level was incorrectly set between the ActionID field and the ZZMSGDET. This should have been between ActionID and ZZMSGTYP table.
- ✚ Fixed the error from fax server related to copying of the \*.msg file.



***Modification as at release 04.04.10a***

- ⊕ Fixed the bug in importation of emails.

***Modification as at release 04.04.10***

- ⊕ Increased the length of the container and folder descriptions from 60 to 80 characters.
- ⊕ Added business name to the list of fields that are checked for duplication when a new client is added. In this case, a new option (from company defaults) determine whether the search is done on exact name or on similar names. When similarity check is requested, only the first two words of the business name is used for checking.
- ⊕ Added an invoice number to the document search screen. This will help to locate a document by an invoice number. This is only available when time cost module is licensed.
- ⊕ Changed the way the invoice documents were launched. If these documents are not launched from within a matter, the matter with maximum matter number for the invoice is used for launching the document.
- ⊕ Changed the way fax server sends the requested faxes. In Internet Only Mode, \*.msg files created from client PC cannot be sent from the server. It seems that the server needs to create these \*.msg file on the machine that it is running in order to be able to send it. Changed the server code so that it overwrites the message audit file when it finally sends the fax.
- ⊕ Fixed a bug in creation of document server, email content and recycle bin directories. Synergy was not serialising this and hence in an environment without a document server process, client machines were creating many directories due to lack of proper locking protocol. This should hopefully be fixed now. When the first client application starts the process of creating these directories, it will lock a table which will exclude others from starting the same process.

*Modification as at release 04.04.09*

- ✚ Fixed a bug in importing documents. Cataloguing was not working for master documents in a document secured environment.
- ✚ Changed the way label printing worked for RMS folders. Synergy now launches the label template and then user can print it if s/he wants. It used to print straight away which may not be what the user wants.
- ✚ Added more user feedback when printing labels. The system will now tell the user what it is doing rather than leaving the user to guess what is going on.
- ✚ Fixed the bug when Mail Merging from the Client Group Enquiry. This used to fail in some XP and Windows 2003 machines. This should be fixed now.
- ✚ Changed the client synchronisation process to copy the DateEntry from ZZSYNCLI. It is no longer initialised to current date.

*Modification as at release 04.04.08a*

- ✚ Fixed a bug in synchronisation of Email address between Synergy and BPR.
- ✚ Added extra warning when adding new clients. We now match the title, ABN, CAN, Surname and if we find duplicates, the user is given a chance to view the details of the clients with matching details. This will help users to avoid adding duplicates to Synergy database.
- ✚ Added a facility at housekeeping that allows follow-ups to be transferred from one staff member to another. This could be used when a staff member leaves and the organisation or changes his/her position within the organisation.
- ✚ When messages are imported from Outlook and the forwarded, Synergy was not copying the original sender. Consequently, the recipient of the forwarded message was not aware who was the original sender. We now copy the details from the original message to the forwarded message.
- ✚ Allowed reuse of an old client account number. Please note that the old account number can only be used for the same client not for another client.
- ✚ Added the Barcode and the reference number of the container to the details of a RMS file as well as adding it to the caption of the RMS edit form.
- ✚ Added facility to change the owner of a RMS folder in bulk. This is available from the RMS tab of the WC, CCC and MCC.
- ✚ Allowed the classification of the RMS folder to change in bulk. This can be done from the Housekeeping (Alter filling classification form).

***Modification as at release 04.04.08***

- ✚ Fixed a bug in Records Management system related to Barcode reader interface.
- ✚ Added client address line 2 to client search screen.
- ✚ Added archive date, destruction date and department id to RMS folders. This will allow users to specify which Department owns the file (since clients could move from one Department to another), when the file is to move to offsite archive and when it is to be destroyed.
- ✚ Added the Department name and external id to the merge table for barcode labels.

***Modification as at release 04.04.07b***

- ✚ Fixed a bug in the Vision ID Generation. The second character was not being set properly.
- ✚ Fixed the image list in the recipient selection form.
- ✚ Changed the fax coversheet validation. Error is only displayed if the fax is actually being sent outside the office, that is it has client, external client or fax number as recipient. If all of the recipients are internal recipients, then there is no need for a coversheet.

*Modification as at release 04.04.07a*

- ✚ Fixed a bug in the Vision ID Generation. The second character was not being set properly.
- ✚ Fixed the image list in the recipient selection form.
- ✚ Changed the fax coversheet validation. Error is only displayed if the fax is actually being sent outside the office, that is it has client, external client or fax number as recipient. If all of the recipients are internal recipients, then there is no need for a coversheet.
- ✚ Another attempt to solve the SQLServer 2000 and MSDE 2000 upgrade problem. The time given to SQLServer to reconfigure itself does not seem to be sufficient in some environments. Displayed a message box so that more time can be given to SQLServer if needed.

### *Modification as at release 04.04.07*

- ✚ Developed a Fax server. This will do exactly what the STSynergy client used to do. To make the server operational, all software that is required for document management must be installed on the server. The “**print to**” verb must be defined for each file types that is used in an organisation and outlook must be capable of sending faxes from the server machine.

STSynergy fax server has been tested with the Microsoft Fax Services. You need to configure Fax services to send and receive faxes to/from an outlook/exchange profile. The server must also be connected to fax line.

It is extremely difficult (if possible at all) to determine if a fax has been successfully sent by Microsoft Fax Server. When Microsoft Fax Server sends a confirmation for success or failure, there is no way for Synergy to determine which fax the confirmation is related to as the email does not carry any information about the original message. I have even tried attaching the UniqueID as “**User Property**” to the original message but this property did not exist when the reply message from Microsoft Fax Server comeback.

The verification process must be done manually just like the old days. This way at least the users has to process only the unsuccessful faxes.

The Synergy fax server can be configured to receive faxes automatically. To configure this, you only need to set up a subject line from company defaults. When the subject line is set, the server, searches for all incoming faxes and imports the ones with matching subject line. The imported faxes are moved to the Synergy folder rather than being deleted.

Synergy Fax Server requires direct access to the document server. If a site is running document security, the windows logon id used to run the Fax server must have direct access to STSynergy document repository.

- ✚ Fixed a bug in faxing. The system should have imposed existence of a fax coversheet. Due to an error in the code. This was not being enforced. This is fixed now. Any fax must have exactly one coversheet. If there are more than one coversheet, the system will warn you.
- ✚ Added two buttons to CCC that allows users to re-establish the link between QuickBooks customer/vendor and a STSynergy client.
- ✚ Fixed a bug in updating locations using barcode reader interface and allowed multiple folders to be checked out at the same time rather than one at a time.
- ✚ Added a drop down combo box that to Client Search Screen that determines which client address the search is related to. Four entries (Postal, Residential, Other and registered office) are currently present.
- ✚ Added a date/time picker to chronology tabs in CCC and MCC. Also allowed users to set a limit similar to documents and communications for the chronology items. This can be set from the housekeeping, company settings.
- ✚ Removed the Tax File Number from CCC for those client types that could not have tax file number.
- ✚ Synergy now adds Departments as Customer/Vendor types to QuickBooks. Please note that the QuickBooks interface does not allow programmatic modification of customer or vendor types. Consequently, Synergy can only set these when new clients are added. If yo modify the department for a client in Synergy, you need to logon to QuickBooks and change the customer/vendor type from QuickBooks own user interface.



- ✚ Added the ability for housekeepers to view Fax and QuickBooks servers status from Synergy. They can only view the data for these servers. All maintenance must be done from the server process itself for many technical reasons.

***Modification as at release 04.04.06e***

- ⊕ Displayed aging details, credit limit and balance for QuickBooks debtors and creditors.

***Modification as at release 04.04.06d***

- ✚ Synergy now displays QuickBooks Sales Receipts, and Adjustment Notes in the debtor and creditor tabs.
- ✚ Changed the way client edit forms works regarding the determination of whether a client is a debtor/creditor. If a client is marked as debtor/creditor in Synergy, unless the QuickBooks server gives us a valid response, that is a return code of OK or not found, we still consider the client debtor/creditor. This will avoid losing links as a result of the server process not running or the user cancelling the request.
- ✚ Added a “Actioned” button for the follow-ups in the “Profiles” tab of the CCC. This will allow users to mark client follow-ups as actioned from the client.

### *Modification as at release 04.04.06c*

- ✚ Removed company seal from the client edit form.
- ✚ Replaced the company seal with the ABN in the CCC.
- ✚ Allowed change date to be modified when new client ids are created.
- ✚ Added a button to records management tabs of CCC, MCC and WC that allows users to move a folder from one container to another container.
- ✚ Fixed the bug in the task tab of the MCC. On right mouse click, error 91 was being display. This is fixed now.
- ✚ Added an invoicing function for QucikBooks customers. They can now create invoice from follow-ups. This function is available form the follow-up tab of the HK.
- ✚ Fixed the error in launching invoice documents. The invoice document now, displays the details of the billing debtor in the invoice regardless of which matter it is launched from. This is consistent with the rest of processing as the clients of the matter are added as related clients to the document and the billing debtor is the only primary client for the document. Hence when finalising the document, only the details of the billing debtor is snap shotted.
- ✚ Fixed a bug in display of the client activity status. This used to pick the record with the highest status date and time. However, if we do data importation, all of the records could have the same status date and time. We now look at the CurrRecID field to determine which activity status is the current one.
- ✚ Fixed a bug in importation of the clients. This was introduced when the BPay numbers were added to the system.
- ✚ Changed the way the client edit forms work in relation to the billing debtors. The application used to check the accounting system for existence of the billing debtor. If the record did not exist or there was an error in determining that, the link was being removed from Synergy. This is changed specifically for QuickBooks. If the Synergy's QucikBooks server is not running, we leave the link intact as we cannot safely determine whether the debtor exists or not.

*Modification as at release 04.04.06*

- ⊕ Enforced the uniqueness of barcodes across folder, container and location.
- ⊕ Added two write off/ write up buttons to the disbursement tab of the MCC.
- ⊕ Fixed a bug in creating email attachment directory.
- ⊕ Fixed a bug in client group enquiry related to the fax merge.
- ⊕ CGE now displays progress bar for most of the operations.
- ⊕ Allowed multiple clients to be added to the list in the CGE.
- ⊕ Added BPay Customer Reference Number and Biller code for clients. These are stored in the ZZCLIBPY and ZZFRZBPY when we snapshot client details.
- ⊕ The setting is stored for each client type in ZZTYPDEF. The client account number, client reference number or a sequential number can be used for generation of BPay CRN numbers. **STS uses Standard Luhns Modulus 10 Algorithm to calculate the check digit. This Algorithm is provided by Mike Campbell of National Australia Bank on 03/03/1998. For this algorithm to work properly, you must leave the check digit length and If setting is changed from the defaults**
- ⊕ When changing client Ids, the system will check to see if BPay details are set for the client type and if so whether it is generated using the account number. If so, the user will be asked whether s/he wants to regenerate the BPay number.
- ⊕ A new setting in the company default allows users to define the host company's biller code. This will be stored along with the BPay CRN in the ZZCLIBPY and ZZFRZBPY.
- ⊕ The BPay numbers are added as mail merge fields when documents are launched.
- ⊕ Added the provision for tracking of files/folders to the system. This follows the normal check in/check out process. Tracking can be done either manually or through a barcode reader. If tracking is done via a barcode reader, synergy displays a **memo** field and expects the barcode reader to put **location** and **file/folder barcodes** into the memo field **one per line**. The download data must **start** with a **location barcode** followed by the **file/folder barcodes**. The process **stops** when the downloaded barcodes are **invalid**.
- ⊕ Provided ability to generate barcodes automatically. The barcode format specifications can contain the following specification:
  - 1.) %N or %N+ indicates a sequential number. A + indicates that this number must be increments for every barcode. Can have at most one of these.
  - 2.) %V or %V+ indicates a version/volume number. A + indicates that version/volume number must be increments for every barcode. The version can exist with the above sequential number. Can have at most one of these is a specification.
  - 3.) %M indicates a matter number.
  - 4.) %S indicates the client surname.
  - 5.) %T indicates the client title.
  - 6.) %Y indicates the current year.
  - 7.) %E indicates the entity name or description.

Each format specification must contain a length within an opening and closing brackets. Examples of valid barcode formats are:

%S(3) %N+(5) V%V(2) will produce the following barcodes for a client with the surname Smith (SMI 00001 V01 up-to SMI 99999 V01)

%S(3) %N(5) V%V+(2) will produce the following barcodes for a client with the surname Smith (SMI 00001 V01 up-to SMI 99999 V99)

A%M(5) - %N+(5) will produce the following barcodes for matter number 147 (A00147 00001 up-to A00147 99999)

%Y(2) %N+(5) will produce the following barcodes for year 2003 (03 00001 up-to 03 99999)

%Y(4) %N+(5) will produce the following barcodes for year 2003 (2003 00001 up-to 2003 99999)

- ⊕ Removed the external identifier and sub number from folder and containers.
- ⊕ Users can now generate barcodes dynamically when they are editing folders, containers or even locations.
- ⊕ Added a new document creation context for folder labels. This will allow a single folder label to be created and attached to as many folders as one would desire. The folder information is merged into a new table called **BRESULT** (B for barcode) which is then available for merging into the document if the application types supports mail merge.
- ⊕ Created a new DSN called **SynergyBarcodeDataDSN**. This could be used to design the file labels if the label printing application supports the DSN.
- ⊕ Added a **Records Management** tab to MCC. This will display all of the folders for a matter. This tab will only be displayed if the site is not using the extended model from the housekeeping. If extended model is ticked, then the old archives tab will be displayed.
- ⊕ Added a **Records Management** tab to CCC. This will display all of the folders for a client. This tab will only be displayed if the site is not using the extended model from the housekeeping. If extended model is ticked, then the old archives tab will be displayed.
- ⊕ The BPay number consists of 4 parts:

Prefix    RefNumber    Suffix    CheckDigit

**Prefix** and **Suffix** can be any number up to a maximum of 10 digits. The length of **CheckDigit** is set to one. Although we have allowed users to change this value, for the above algorithm, it should always be left as the default. It is also possible to specify whether the check digit is the rightmost or the leftmost digit. The default is for the check digit to be the right most digit. Yet again, for the above algorithm, the check digit check box must be left as its default value.

The **RefNumber** can be a string of characters and digits. However, characters must be at the beginning of the **RefNumber**. These characters are translated using the mapping options stored against the client type. If there are no mapping for a character, then it will simply be ignored. The length of the **RefNumber** is calculated using the following equation:

$$\text{Len(RefNumber)} = \text{Len(CRN)} - \text{Len(Prefix)} - \text{Len(Suffix)}$$

The length of the CRN are specified when client types are set. The following example shows how CRN is generated:

Prefix: 40110  
Suffix:  
RefNumber: BPS99  
Length of CRN: 10  
Check digit length: 1  
Check digit: Right most character  
Translation table: (S => 9, C => 8)  
BPay CRN: ""

- 1) Calculate the length of **RefNumber** (5 digits).
- 2) Set the result to blanks.
- 3) Translate all preceding alphabetic characters using translation table and append it to the result.. **B** and **P** are ignored as there are no mapping exists for them and **S** is converted to a single digit **9**. Append this to the BPay CRN (should be "**9**" at this stage).
- 4) Since we have finished all alphabetic characters, we take the rest of the remaining characters and pad it with zeros to the required length (4 since we already have one character in the BPay CRN). The resulting conversion will produce **0099**.
- 5) Append this to the result. BPay CRN should now be "**90099**".
- 6) Combine the prefix, refnumber and suffix as indicated above. BPay CRN should now be "**4011090099**".
- 7) Calculate the standard Luhn's Modulus 10 check digit. This will produce a single digit **6**.
- 8) Append this to the end of the result which will produce the final BPay CRN which is "**40110900996**".

***Modification as at release 04.04.05***

- ⊕ Fixed the error generated when adding client types.
- ⊕ Fixed the error (no current record) when adding new debtor or creditor to QuickBooks.
- ⊕ Fix the error generated when creating messages from Postmaster form.
- ⊕ Added retention code to documents.
- ⊕ Added creation date to the RMS containers.
- ⊕ Added location, retention code and colour code tables to the database.
- ⊕ Added retention code, colour code label document and creation date to folders. This will allow users to design and print labels for folders. Also added a person responsible for the folder that allows user to specify who is the person responsible to look after the file or folder.
- ⊕ The RMS tab of the work centre have been extended to allow most functions needed by a Records Manager.
- ⊕ Enforced the uniqueness of the barcode across the container and folder. This will help us to uniquely identify the entity when the codes are scanned by a barcode reader.
- ⊕ Added a security group to indicate the Records Management Officers. This will help to indicate who has access to the Records Management Centre functions (checking in/out, barcode interface etc).



***Modification as at release 04.04.04b***

- ⊕ Allowed everything to be done for inactive billing periods.

***Modification as at release 04.04.04a***

- ⊕ Fixed a bug in disbursement form. It was not saving the revenue and expense accounting details correctly. Consequently, the disbursements were not being transferred to QuickBooks database.

#### ***Modification as at release 04.04.04***

- ✚ Added security groups for additional data maintenance. Users can now define who can add, edit or delete additional data for clients or matters.
- ✚ After addition of the security to additional data, only system administrator can add, edit or delete the additional data type from housekeeping.
- ✚ When adding additional data to a workflow (decision node), a warning is displayed if the selected additional data type has security groups for addition. Similarly, when adding security groups to additional data types, a warning is displayed if that additional data type is used for workflow.
- ✚ Added a second date to the follow-up tab of the “**Work Centre**”. The type of follow-ups displayed are as follows:
  1. All the entries that must be followed-up within the specified date range
  2. All the past follow-ups that have not been actioned.
  3. All the follow-ups from to-days date that have not been actioned or falls within the lead days of the contact date.
- ✚ The follow-up counts that are done at the start of the program uses the same criteria as above. Obviously, when counting, there is only a single date and that is the current system date.
- ✚ Added an edit button to the profile tab of the CCC. Also displayed the preferred dispatch method for the client in the comment box.
- ✚ Increased the length of the ABN in the client search screen from 9 to 11 as it should have been.
- ✚ Added a print button to DCC. This will help to print various documents in bulk. Please note that the mail merge to document will not work if there are more than one client attached to the document. This was merely put there to ease printing of all master documents since they are not attached to any clients or matters.

***Modification as at release 04.04.03***

- ✚ Synergy now displays the real sender's name when messages are imported from outlook in message list boxes. Also when you reply to the imported messages, the sender's email address are added to the list of recipients.
- ✚ When importing messages, synergy now attempts to attach the correct client(s) to the message based on the email address of the sender. A maximum of 9 clients are added if there are multiple clients for an email address.
- ✚ Added a matter id field to the document search screen.
- ✚ Added a messages from a task, the matter id is now being passed to the message form which in turn gets passed to the document search screen. This will make attaching documents to a message easier than it is now.

### *Modification as at release 04.04.02*

- ✚ Fixed an error in replacing symbols in Excel documents. It was generating errors while replacing symbols when there was blank sheets in the document.
- ✚ Added Activity reason drop down combo box to client search screen.
- ✚ Added an option to the department that allows users to specify the activity options in the client search screen. They can also select activity reason and inactivity reason that will be used in the search form.
- ✚ Added a client dispatch method to top tier profiles. If “N/A” is selected, then when adding profiles, users will not be able to select a dispatch method. Anything else will indicate the default value for the selection. This default value can be changed when adding profiles to client.
- ✚ AdHoc enquiry form is changed to allow search by the client dispatch method.
- ✚ Secured follow-up to those that are responsible for it and their trusted users. From this version onwards, the only people than can edit or delete a follow-up are those in the user list or their trusted users. When saving a follow-up, the security is checked and if the person does not have access, s/he is warned before unloading the form.
- ✚ The Also Known As is extended to allow the ability to track these changes properly. We have added an effective date, comments and a reason for change. The reason for change is generalised to capture both ID and name changes.
- ✚ Added a default reason for name change to the company defaults.
- ✚ In many cases, users wanted to set a non-recurring follow-up that was, say 6 weeks, after the start date of the follow-up. In this case when they were creating the follow up, they had to calculate the next follow-up date manually and enter it as follow-up date. Given that we have a similar facility for recurring follow-ups, we changed the system to allow this calculation to be done automatically. When the number for recurrence is set to 0, there will be no calculation done by the system. Any other number will force calculation of the next follow-up date.
- ✚ Departmentalised the follow-up and association categories similar to classification and matter types.
- ✚ Added a department dropdown to associates tab of the CCC that allows filtering by Department.
- ✚ Changed interface to display the action date for follow-up in WC, MCC and task form. Also the date entry fields changed to date-time picker.
- ✚ When creating a document, if you select the radio button marked “**Any existing document**”, the tasks of the selected document will not be attached to the new document.
- ✚ Added escalation facility for follow-ups. Each user can have a different setting in terms of the over due days before s/he gets notified. **Escalated follow-ups** can only be viewed from the Work Centre at this stage as that is the only sensible place one should look for these sort of information. A check box allows users to toggle between their follow-ups and those that are escalated for them.
- ✚ The escalation details can be set as default for each follow-up type from housekeeping. These are copied when a follow-up type is selected.
- ✚ Added an option to company default **Misc tab** that allows users to define whether imported messages should be attached to the host client or the user that is logged on.
- ✚ Added an option that allows user to define whether importation of email can be done from any folder in outlook. If this option is selected, a form will display all of the outlook folders that are marked to contain mail item. The user’s inbox will be displayed and all unread items will be selected by default. The user can then decide what s/he wants to do. In the absence of this option, the system will behave as it does in the previous versions.

### *Modification as at release 04.04.01c*

- ✚ Any imported message without an email address was being considered as a fax. This is changed so that when messages are imported if there is an email address, Synergy examines it to see if it fits a fax number. If the email address is blank, the sender's name is examined to see if it is a fax number. So if you get an email that has all numeric name for sender and no email address, Synergy will import it as a fax. In my experience, only spam emails have these characteristics. This is as best as it gets without having to manually force the user to select what s/he is importing.
  - ✚ Exported invoice number rather than reference number to QuickBooks.
  - ✚ Ensured that the invoice data is merged into invoice document when it is created.
  - ✚ Added a right mouse option to the invoice tab of the Work Centre. This allows users to go to the billing debtor or the matter. If there are more than one matter, a sub menu will list the matter numbers and descriptions for selection.
  - ✚ Changed the content type option in the message form to only allow unformatted text for faxes.
  - ✚ Added a build name check box to the client and prospect edit forms. It will be available for certain types of clients (i.e. individual, staff, student, prospect, other). When checked, it builds the title from the given name, other names and surname.
  - ✚ Changed the label in the client edit forms from Contact/Client name to Given name.
  - ✚ Changed the label in the client edit forms from Contact/Client surname to Surname.
  - ✚ Removed inactive users from the user list in the grapevine tab of the Work Centre.
  - ✚ Removed inactive users from the user list in the trusted users of the user form. They can be included using a check box if needed.
  - ✚ Added a new option in accounting form. This allows users to set a mapping between STSynergy and the customer or vendor name in QuickBooks. The options are
    1. Account number only: Customer/Vendor name will be client's account number.
    2. Account number + Title:  
If account number is 01A003AX and client title is "Robertson Family Trust" then Customer will look like "D01A003AX Robertson Family Trust" and Vendor name look like "C01A003AX Robertson Family Trust".
    3. Title + Account number:  
If account number is 01A003AX and client title is "Robertson Family Trust" then Customer will look like "Robertson Family Trust D01A003AX" and Vendor name look like "Robertson Family Trust C01A003AX".
    4. Title only:  
If client title is "Robertson Family Trust" then Customer will look like "Robertson Family Trust" and Vendor name look like "Robertson Family Trust".
- When this option is changed, then the user is asked if QuickBooks should be updated. If you say yes, it will try to update the customer and vendor names. Remember that this has to be done on a machine that has QuickBooks installed and have access to the company file.

***Modification as at release 04.04.01b***

- ✚ Fixed a bug in exportation of invoices to QuickBooks.
- ✚ Fixed a bug in importation of diary appointments.
- ✚ Fixed 440 Automation error that was being generated when new users are added.

***Modification as at release 04.04.01a***

- ✚ Fixed a bug in exportation of debtors and creditors to QuickBooks. Also ensured that the invoice references are cleared when changing to QuickBooks accounting software.
- ✚ Fixed a bug in message form. It was closing the word application from desktop.



***Modification as at release 04.04.01***

- ⊕ Developed a new QuickBooks server process. This will help Synergy users to get more concurrent connection than QuickBooks allows if they use synergy. The server uses one connection to the QuickBooks company file. So if there are 5 licenses, then only 4 other users can connect to the company file. Need to test this in a real environment where there are multiple people using it.
- ⊕ Fixed a bug in sending faxes.

***Modification as at release 04.04.00a***

- ✚ Fixed a bug that surfaced up in document secured environment related to message content files (\*.rtf files).
- ✚ Changed the server process to count the document, email and recycle bin directories if it has something to do. It used to do this regardless. Also changed the counting of the directories is done every minute now.
- ✚ Fixed the bug on launching the word documents.
- ✚ Message form now works with office 97. The problem was caused because of the different naming standard between office 97 and office 2000.
- ✚ Made sure that in lower resolutions (800X600) the message form resizes itself so that it fits in the window.
- ✚ Fixed a bug in performance tab. The excel chart was being made invisible after creation even when the option was set to view charts in Excel from company settings.

### ***Modification as at release 04.04.00***

- ✚ Added ability to send messages in rich text format. In this format, the content of the message is saved as **\*.rtf** file in a message content server directory specified in company defaults.
- ✚ Added ability to automatically maintain the creation of new document server, recycle bin and message content server directories. These required information can be configured from the automation tab of the company defaults. Please note that if the root directory of the recycle bin, document server and message content server is the same, Synergy will insist on having different prefix for them. Also remember that the maximum number of files in the directory is just an approximate figure. Synergy will not guarantee the exact number since it is dependent on a number of factors. Talk to me if you need more details.
- ✚ When attaching documents or tasks to an appointment, the client that is selected in the primary client list is passed to the search forms now.
- ✚ Users can now configure what control centre they want to load at the application start-up. All control centres plus the home screen can be selected per user. As part of this upgrade, all users record will be set to load with work centre with the exception of the system administrator. This way the system will behave as is.

### ***Modification as at release 4.03.11***

- ✚ Fixed a bug in diary related to displaying incorrect appointment details.
- ✚ Fixed a bug related to deletion of appointments.
- ✚ Added two options to company defaults to allow sites to decide how image files should be printed on XP environment.
- ✚ Added an option to message which allows users to send HTML messages. Users can now navigate to a HTML file (using the popup menu displayed from the message body by clicking the right mouse button) and copy the file into the content of the message and when this is sent by Synergy, it gets sent as HTML message rather than a text message.
- ✚ Fixed a bug in user form related to adding and deleting filing clerks.
- ✚ Added a new option to company defaults and users that allows sites to define if they want to view the performance graphs using Microsoft Excel. When this option is selected from Housekeeping, that is the default for the entire organisation. However, the same option can be set for each individual user if required. At user level, there are 3 options, Use Housekeeping Setting, Display graphs in STS or use Excel for graphing performance data. When a user has selected to view graphs in STS, they still have the option of exporting data to Excel if they want to. Graphs in STS are plotted using Excel behind the scene but displayed as an image within STS.
- ✚ Added an option to Matters tab of the WC that allows users to eliminate any matter that do not have a specific target day.
- ✚ Added a label to MCC general tab “**Do not contact client directly**”. This will be visible when the do not contact client directly check box is ticked for a matter.
- ✚ When calculating the invoice amount break down (for each matter) in invoicing form, the cursor were not ordered by MatterID and hence in some cases Synergy was attempting to create duplicate rows on ZZINVBK table. This is now fixed.
- ✚ Added support for Crystal 9. Synergy now tries to start the report using Crystal 9. If it fails to create the required objects, the it will try crystal 8.x.
- ✚ Changed the reports gallery so that all user defined reports that are developed using the crystal report are started in run time environment. This will allow users to associate \*.rpt files to default file association which then will bring the documents up in the designer if the user has the designer installed on their machine.

### ***Modification as at release 4.03.10***

- ✚ Progress bars has been revamped to look more colourful.
- ✚ A bug was fixed in timesheet entry form. The timesheet types that were not linked to a task was being displayed in the bottom dropdown combo box.
- ✚ Changed the way the grid behaves in time and disbursement forms. If the user clicks the three dotted button, the pick list will be displayed regardless of the tax code or GL code displayed in the grid.
- ✚ invoice totals are now displayed at the bottom of the invoice form (total of time and disbursements).
- ✚ Fixed a bug in disbursement creation form. It was not saving the revenue accounting details correctly. This is now fixed.
- ✚ Also there was another bug that was not clearing the InvoiceID field for disbursements when exiting the invoice form. This is fixed now.
- ✚ There was a bug in the STViewer program that did not display the additional data reports. This is fixed now.
- ✚ There was a bug in adding attachments to an E-Mail or Fax. This is fixed now.
- ✚ Added a button that displays a list of business names for a client from CCC general tab.
- ✚ Added internal notes to ZZCLINOT. This will allow users to have an area wher they can put comments that will not be printed in reports. The CliNote field is still available. There is no security imposed on the IntNotes field.
- ✚ Often when the client type changes, the activity status must change as well. Currently, this is a two step process. The user has to change the client type and then remember to change the activity status as well. Occasionally they forget to do the second step and hence the activity status becomes inconsistent. We have added an option that allows users to define whether they want the change of activity status form to load automatically after successful change of client type. This option lives in the company defaults for the entire organisation. However, if a department prefers to do this manually, then the option can be set on department basis. Options set for a department overrides the housekeeping setting.
- ✚ When the “Change ID “ button is clicked from the CCC, the change date and time is now displayed in the pick list.
- ✚ Added a ReadRecpt field to the message table ZZMESSAG. This allows users to specify (per message) if they want a read receipt from the message recipients.
- ✚ Changed the upgrade process so that the pre-population of the data is also logged to the log file. This will help to determine where exactly the pre-population has failed.
- ✚ Added a new flag to company defaults that allows sites to set an extra level of warning when messages are sent via their external email system. This will give staff members a chance to stop emails that were not meant to be sent to external sources. No matter how careful one might be, mistakes will happen but this will reduce the possibility such mistakes which could be very expensive at times.
- ✚ Fixed a bug in approving/un-approving matters.
- ✚ A new form was designed to display the costing details for a client. It allows users to filter out billed items to any period they would like to see.
- ✚ In the performance tab, when All option is selected, a new column will display the combined value of the billed and unbilled write off/up.
- ✚ A reply button is placed in the messages tab of the CCC.

### ***Modification as at release 4.03.09***

- ✚ The length of the UniqueID field for write off/up records was set to 7 rather than 11. This will cause problems because the right most 4 character will always be space. This version fixes the UniqueIDs in both time and disbursement write off/up tables.
- ✚ Removed the InvoiceID form ZZTMEFWH, ZTMEDWH, ZZTAXFEE, ZZTAXDIS and ZZTAXDSC as they never get used.
- ✚ The clear button on the “**Other options**” tab of the Department form was not working. This is fixed now.
- ✚ Relaxed matter approval rules. It used to check the security groups first before checking the matter approver. The order is now reversed. If the person is the approver of the matter, it gets automatic access to approve the matter regardless of any security group setting.
- ✚ The image edit control is now dynamically loaded by Synergy. The controls (ocx and exe files) will not be shipped by the set-up program any more. Remember that these files are no longer part of the WinXP operating system and requires purchase of appropriate licenses.
- ✚ A new standalone application is created for running Crystal Reports. Users can now load their crystal reports independently. This will help users to load a report and if the report is a long running report, still have the ability to continue working on Synergy. There is a new executable STViewer.exe that will be installed from this version onward in the same directory as the Synergy app. You can turn this option on from the Miscellaneous tab of the company defaults (the last option “Run Crystal Reports as standalone application”).

### *Modification as at release 4.03.08*

- ✚ Synergy now creates invoices in QuickBooks. In order to do this, the GL codes are renamed to GL/Service codes. Users must create QuickBooks **Items** with item numbers that match the External Ids. When invoices are pumped into QuickBooks, the external identifiers from ZZGLCODE table are used as item numbers in QuickBooks.
- ✚ Added a business number to trading name table. This will allow users to capture the registration or business number that is issued for each trading name. These business numbers are visible from the client edit form and more information button from CCC. The only place to enter the business number is when adding new business names. However, if the BusiNumber column exists in the importation table, they get copied to Synergy. No validation is done on this column.
- ✚ Running totals are displayed in the time/disbursement tab of the invoice form.
- ✚ Only allowed to select time items with balance amount greater than \$0.00 when invoicing. If an unbilled time is being written off completely, then there is no need to include that in an invoice.
- ✚ Synergy was sending messages even if the attachments could not be correctly attached to the email or fax. For example, if the document is locked (in a document secured environment) or open on another application, then synergy may be unable to attach it to the email/fax. Added a warning message in this case so that the user at least is aware that the attachments were not included and have the option of aborting the process. The message will still be sent to all of the internal recipients but none of the external clients will receive it if the user decides to abort the process.
- ✚ Added a message to the message for to inform the user the reason why an attachment were not added to the email or fax. There could be two reasons for this. First, we may not have an application type for the attachment. Finally, we may not be able to copy the attachment to the attachment directory. This could happen if the file is open on another application.
- ✚ Added ability to search by the newly added business number on the client search screen.
- ✚ Added the copy document button to the DCC.
- ✚ Changed the values stored in ActBlock and EstBlock columns in ZZTMECST. As they are a long integer type columns, they would not allow storage of fractions. This will create a problem if the number of minutes per unit is not fine enough. For example, if one sets the units to be 60 minutes (one hour), then the users are stuck with entering blocks in multiples of one hour. Synergy is now changed so that the value that is stored in these columns are multiplied by 100. For example if one enters 1.5 blocks the value stored in the actual column would be 150 (100 times 1.5). This allows us to store up to 2 decimal points which is good enough for reasonable units such as this. Users that are using this column must divide it by 100 to get the actual value. One needs to be sensible when setting units.
- ✚ Fixed error 440 that occurred when unbilled time items were being split. As you may know, when committing a transaction to the database, all open cursors will be closed. Splitting uses transaction to keep everything as one unit of work. When it was done, the transaction gets committed. Then when the users goes back to the invoice form, the open cursor that had the invoice details would have been closed and needed to be reopened. This is done now.

***Modification as at release 4.03.07c***

- ✚ Printing of images was not working in WinXP environment. Synergy now uses the Image Acquisition Library to do print image type files.



***Modification as at release 4.03.07b***

- ✚ The bulletin board messages format is change again. I think this is it:

On XX TT UU said: BM

Where XX is name of the day

Where TT is time in HH:MM format

UU is the user's name as it appears in ZZUSER

and BM is the message

- ✚ [Task RefNo: 20020923-1358] The count of follow-ups was not correct. It was missing all of task related follow-ups that was in the system. This is fixed now.
- ✚ Made sure that users cannot use the wrong version of DataWhiz.mdb or Synergy.exe for upgrade process. This caused a problem when a user copied only the DataWhiz.mdb and tried to upgrade a company without upgrading Synergy. The application now will reject if the latest version in the DataWhiz.mdb does not match that of ST Synergy app.

*Modification as at release 4.03.07a*

- ⊕ Added ability to import customers and vendors from Quickbooks.
- ⊕ Importation of clients from accounting backend was not creating records in the ZZTRDNAM and ZZCLIAKA where as the normal client importation was creating these records. Synergy now adds the appropriate records to these tables when new clients are imported from accounting backend.
- ⊕ Ensured that billing periods are rolled over in sequence, that is period 1 is rolled over before period 2 and period 2 rolled over before period 3 and so on.
- ⊕ Made sure that invoice could not be deleted if they had an item that was part of a closed period.
- ⊕ Made sure that the deletion of invoices did not delete the tax entries or write off/up for closed periods.
- ⊕ Fixed up closure of a period. It was not calculating the correct amounts. This needs to be tested carefully.
- ⊕ When users are in a secured document environment, Synergy asks users every couple of hours whether they want to check in their documents. This seems to be causing problems when people have documents open in the background. This is changed to a warning and the user does not have option of checking in the document. However, everything else is still the same, they are asked when they logon or logoff from the system. They can also manually check in their documents from various places (DCC, WC etc).
- ⊕ We now display the user name, date and time of the bulletin board messages. There is a difference between me asking you to do something and others. You generally listen to other and ignore whatever I say. The format is:

At XX on YY UU said: BM

Where XX is time in HH:MM format

YY is date message created in DD/MM/YYYY format

UU is the user's name as it appears in ZZUSER

and BM is the message

- ⊕ Changed the way splitting works. The list box entries are all now checked on and you need to check them off if you want to exclude them.
- ⊕ When a period is closed, the time and disbursement items are locked. If you create an invoice that contains these types of entries, you will not be able to delete the invoice. Also I have allowed tax entries for the time and disbursement entries that belong to the closed periods only if there are no tax allocation records.
- ⊕ A bug was fixed in company defaults. The GL code for the writ off/up and time was not being stored correctly.

### **Modification as at release 4.03.07**

- ✚ Added ability to snooze appointment reminders. The new form is a non-modal form that can be minimize and left there without interfering with the Synergy's operation. However, when you log out, it will close the reminder form. The form will display one appointment at a time, There are two buttons to go to the next or previous appointment and there are buttons that allows you to dismiss or snooze a reminder. The available time for snoozing is dependent of how long is left to the actual appointment. If there is less than 5 minutes, then you would not be able to snooze the reminder.
- ✚ Changed the display of the user list box in the calendar form. When you add a user to the list, you can now see all of his/her appointments for the selected date. This will help to pick up a suitable time for the appointment. The reminder also has been extended beyond the 3 hour limit that we had. It is now dependent on the actual appointment date and time and you can set up a reminder to any time between now and the appointment time. Obviously if the start date is in the past, the reminder will have only one entry ("**Not Available**"). The list also displays the actual appointment time in the form of two vertical black lines. Two new fields have been added to the ZZCALAPT and ZZCALNDR table to snapshot the original notification date and original reminder.
- ✚ (Issue Num [421] 20030519-1148) Fixed the error ("**94 Invalid use of Null**") in the additional data form in house keeping..
- ✚ (Issue Num [421] 2003/05/01) There is no bogus helpdesk message. The extra message is an unsent message for helpdesk sitting in System Administrator's outbox. We can ignore unsent messages but if we do then you will never know that such messages exist in the system.
- ✚ (Issue Num [421] 2003/05/08) Double clicking in the comms tab of the WC no longer opens up the communication form for trusted users.
- ✚ (Issue Num [421] 2003/05/08) There is no problem as far as I can see in calculating follow-up dates. It could be the machine's configuration. I have set follow-up dates up 2914 and surely there are more than 115 day between 2003 and 2914.
- ✚ There was a problem with launching the protected documents. It occurs when Synergy tries to attach the Synword8.dot to the document. Attempted to unprotect the document before this and protecting it straight afterward. My tests shows that it works. However, remember that if the password for un-protecting is not the same password that is set at the doc properties (misc tab) user will be asked to enter the password. Failing to enter the correct password will close the document.
- ✚ Fixed error 35602 "**Key is not unique in collection**" error. The problem will only happen if you sort a ListView by a date, datetime or numeric column. The reason is a bug that exists in VB. Synergy used LVM\_SORTITEMS windows API to sort the items in the list. This API only sorts the list but the index of the wrapper items provided to VB developers (ListItems) gets out of sync with the actual list itself. For example, the first item may have an index of 12 and the second one may have an index of 5 (depending on their original position in the list). This should hopefully be fixed now. As a result the sorting has become orders of magnitude faster. For instance, a list of 25000 documents in the document control centre took over 10 minutes to sort on the creation date and I simply gave up and killed the App. However, with the new method, it took just over 4 seconds to sort the same list.
- ✚ Fixed the message detail text box refresh problem in the WC. When you clicked between centres, the details was that of the first entry in the list.
- ✚ Added a finalise reactivate button to the favourites tab in the WC.
- ✚ Fixed error 40002 when approving invoices. This was a result of the document being finalised at the time of creation and being finalised again at the time of approval. Since the document was created as a finalised document all the snap-shotting of the client and document information was already done when an attempt was made to

finalised it again, Synergy was trying to insert duplicate records into various tables. This should be fixed now. Also made sure that when the invoice is approved, the list box was refreshed.

- ✚ Allowed splitting of a time cost summary record. This is a very complex process and should be used with extreme care. The only place that one can do this is when the unbilled time is being added to an invoice.
- ✚ Added a new report, zzudfrep.rpt. This report displays all of the additional data columns used within synergy for document replacement symbols, templates or the additional data reports. This will help users to check usage of an additional data column before deleting it. **Please ensure that the above report is copied to the SYSDIR directory.**
- ✚ Synergy now remembers the last company that a user selects. When the logon form is loaded, the last company accessed will be selected automatically.
- ✚ The outlook DLL now checks a meeting item before responding to it. This will avoid infinite loop of responding when an attendees Inbox is forwarded to another attendee within Outlook.
- ✚ Added ability to relate matters to each other.
- ✚ Added bulletin board to synergy. The knowledge officers can now add bulletin board messages that gets broadcast on the status bar of the MDI form to everybody. The bulletin board is refreshed at regular intervals (tied to the same timer as the message checking). The popup menu that is displayed by right mouse clicking on home screen or the MDI form has two new options to disable/refresh bulletin board.
- ✚ When adding time or disbursements in the invoice form, when you want to select a time item, it asks you whether you want to select a different matter. If you say no, it always displays the list of unbilled time for the matter that you started invoicing from. This is now changed so that if select a different matter, the list of unbilled time will be for the matter that you have selected last rather than the initial matter. A similar method is used for the disbursements.
- ✚ We allow users to set their own background image for STSynergy from company defaults. There needs to be 4 images (640X480, 800X600, 1024X768, 1280X1024). The files must be one of the supported graphics file (\*.wmf, \*.bmp, \*.emf, \*.gif and \*.jpg). If they select other file types, windows picture box may be unable to load them. Just remember that nothing else on the home screen or the MDI form will change, only the background. So users must check the system with the new bitmaps first. The logon screen, about dialog and all other forms that contain STSynergy bitmap will still have the current bitmap. The images are optional, so if they do not set anything, the system will remain as is. However, if they select documents from the document management system, they will incur the penalty of loading the images when they logon.
- ✚ Added ability to attach user procedure documents to forms in synergy. The control centres have entries by default and the users just need to attach user procedure documents to each control centre. This can be done from the company defaults (user procedure document tab). There is also a provision to specify which function key should load the user procedure document. Obviously, F1 and F2 cannot be used since F1 is the standard help key and we use F2 for library text. Any key from F3 to F16 can be used for this purpose. If users require to add a user procedure document to a non-control centre form, system administrator needs to logon, load the required form and press the function key assigned to the user procedure document. The system will detect that there is no user procedure document assigned to the form and will ask the system administrator if s/he wants to add a user procedure document. If s/he says yes, the document search screen will pop up so that the user procedure document can be located. Once that is done, the system administrator needs to enter a description and that is the end of the process. A record will be created in the database linking the form to the selected document. One advise is that these documents should always be

finalised, and be accessible to everybody, otherwise, nobody will be able to access them.

- ✚ When changing accounting backend to Quickbooks, the user will be asked if s/he wants to export the current debtor/creditor records to Quickbooks first. If the answer is yes, then Synergy will export all of the client information marked as debtor into Quickbook customer database and all of the creditors into Quickbooks supplier database. CIS and BPR users will not have their contact and affiliate records exported to Quickbooks supplier database since they are not suppliers.

### *Modification as at release 4.03.06*

- ✚ Synergy now allows invoices to be in two states, submitted and approved. In the previous versions they were always approved. Now, users can create invoices which are viewed as temporary invoices or submitted invoices. The invoice then is looked at by the invoice approvers and any required changes are applied. Once an approver is happy with the invoice, he can approve the invoice which in turn will finalise the invoice document. The description of the security group has change to reflect this change in company defaults. Once an invoice is approved, no changes can be made to it through Synergy.
- ✚ The **end of the month** process will check to see if there are unapproved invoices. It will not proceed if there are unapproved invoices for the period.
- ✚ Added reviewers for each invoice. Each reviewer can look at the invoice and comment on the invoice, which can be viewed by other users.
- ✚ Write Off/Ups now have a two tiered reason code attached to them, which can be selected when writing Off/Up time and disbursement items.
- ✚ Fixed a bug in deleting the user's billable hours for each period. This was clearing the entire table for the selected billing header (e.g. 2002-2003 Financial year).
- ✚ Added a new grid to the disbursement that allows users to enter the expense GL codes. The old accounting tab is now renamed to "Revenue GL codes".
- ✚ Added a SupplierID to the disbursement that indicates who was the supplier. If Synergy is attached to an accounting backend, at the time of creation, the supplier must be defined as a creditor within Synergy.
- ✚ Added a Write Off/Up option to the performance tab of the WC. This will help managers to look at Write Off/Ups for staff member.
- ✚ Added a copy button to the document tab of the CCC and WC. This will help customers to copy a document without having to search for it.
- ✚ Synergy is now integrated with Australian version of QuickBooks Pro 2003. The Customer and Supplier details are inserted into QuickBooks when debtors and creditors are added from Synergy. Unfortunately, QuickBooks does not allow the same client to be both customer and supplier and hence you should never define a client to be both debtor and creditor when you are linking to QuickBooks. This integration is using the QuickBooks SDK "OZ2.0" and unfortunately, it will not work with old versions of QuickBooks. Hence, you may need to upgrade your software to a version that will work with SDK version 2.0.
- ✚ Fixed a problem in Client Edit form. It was related to the Reverse Synchronisation of clients from CIS to Synergy.
- ✚ Fixed a bug in the WC related to the selection of trusted users from the combo box.
- ✚ Changed the way the address source details were being displayed in the client edit form when the synchronisation is from CIS to Synergy. When editing debtors and creditors, the address source ID will now have a red background if the client's postal address details do not match that of the address source's postal address details. This will help highlighting discrepancy that CIS data has created in Synergy. The client's postal address will always displayed in this situation rather than the address source's address details.
- ✚ Changed the default of the maximum value to 999999 (depending on the length specification) when creating currency additional data fields. Both minimum and maximum were being set to \$0.00 if nothing was being entered. Also before saving the record, if the minimum and maximum has the same value, user has alerted and needs to confirm before saving the record.
- ✚ Fixed a bug in the tasks tab of the WC related to the date fields. When they were being entered, a cursor not defined error was being generated. This is now fixed.
- ✚ Some add buttons in the user edit form was not being handled correctly. They were meant to be enabled for system administrator only but it was enabled regardless.

Also the right mouse button was displaying popup menu even when the logged user was not a system administrator. All of these are fixed now.

- ✚ Fixed the bug related to performance tab. When the form was being loaded for the first time, if the user was not suppose to see performance tab, it was disabling it and was not creating the chart object. However, if you did something else, the tab was being enabled and when you clicked, it was trying to display the chart (which never was created in the first place) and hence the crash.

***Modification as at release 4.03.05h***

*The following bug was discovered on V04.03.07. However, due to a request from Gurmit, it was applied to V04.03.05g for BRB. This fix will also be on V04.03.07 not on V04.03.06.*

- ⊕ There was a problem on calendar in Windows 98 machines. The synchronise and export options were not being displayed at all. This is now fixed.



***Modification as at release 4.03.05g***

- ⊕ Changed the client synchronisation process to treat the third parameter differently. This parameter determines whether a message box is displayed at the end of the execution. The default was to display the message box. This is now the opposite.
- ⊕ Also changed the log file processing. If the file exists, then the messages are appended to that file. Also logged the start and end times.

*Modification as at release 4.03.05f*

- ✚ Changed the determination of emails from faxes when importing messages. If Synergy cannot determine the email address of the sender (i.e. blank), then it is imported as fax. Otherwise, it will be imported as fax if the sender's email address is a fax number. Synergy strips the following characters from the sender's email address before attempting to check for a fax number: Space, '+' '(', ') and ';'.

### *Modification as at release 4.03.05e*

- ✚ Added security check when documents are being inserted into other documents. This will allow users with proper access privileges to insert confidential documents into other documents rather.
- ✚ The Customer and Vendor integration code for QuickBooks 2003 has been added to the project. However, there is no entry point to select the QuickBooks as an accounting backend. This will be released when we have the application and tested the integration code.
- ✚ The message form now allows users to launch documents even when the message is sent. This can be achieved in two ways, using launch option from popup menu or by double clicking on the image or the document name.
- ✚ There was a bug in the whole diary system that surfaced up when synchronisation of appointments were attempted between Synergy and Outlook's calendar system. It will also occur when a user deletes an entry through SQLServer interface from ZZCATAPT table and leaves the ZZCALNDR entry there (remember that ZZCALAPT is the child table and ZZCALNDR is the parent) rather than Synergy. Given that Synergy does not support recurring appointments, the UniqueID of ZZCALNDR and ZZCALAPT tables are always the same and the code was relying on this. An attempt has been made to remove this dependency on this version. Also fixed the bug in the appointment synchronisation. Please let the Software Development Team know if you find anything out of ordinary in Synergy's diary system.
- ✚ There was another bug discovered when Synergy appointments are synchronised with Outlook calendar appointments. This was not in the synchronisation code rather it was in the sending Outlook responses from Synergy. This bug will surface up when a user (say U1) creates an appointment for another user (say U2) and the second user (U2) updates the appointment in Synergy. This situation will cause outlook to repeatedly send update message to the second user (U2).
- ✚ The accept and tentative operations were not working correctly between Synergy and Outlook appointments either. Fixed this so that when you accept an appointment, the Outlook appointment is updated too. A word of warning about declining or deleting appointments from Synergy. In both these cases, the Outlook appointment will disappear from your calendar in Outlook. The only way to get the appointment back into your Outlook calendar is for others to open up the appointment (and add you to the list of attendees if you are not there) and save the appointment.
- ✚ Just remember that whatever you do to you appointments, these changes are reflected on **your appointment only**. We have not integrated with Exchange Server and it is possible that different users to have different versions of the same appointment. Exchange Server integration is scheduled for the future releases.

***Modification as at release 4.03.05d***

- ⊕ Fixed client synchronisation process so that the client activity record is created for updates. This was not happening after we swapped the order of checking CTypeDefID and ActivityID in V4.03.05c.

***Modification as at release 4.03.05c***

- ✚ Added the urgent column to the work centre inbox list.
- ✚ The client synchronisation process had the processing of client activity in reverse order. It was checking the CTypeDefID from ZZSYNCLI before the ActivityID from ZZSYNDET. Swapped them so that the ActivityID from ZZSYNDET takes precedence to the CTypeDefID from ZZSYNCLI when updates are processed.

### *Modification as at release 4.03.05a*

- ✚ Fixed a bug in creation of distribution list (13 type mismatch). That form should work properly now.
- ✚ The approver list in the matter form was not being saved. Added a call to the save method to save the entries from the list.
- ✚ The copying to briefcase was not letting the users to copy the document if they did not have a secured directory. This is change to consider the secured directory if and only if the document security is implemented.
- ✚ Fixed a bug in the grapevine report for communications. It was not reporting the users correctly. There was no changes to the report.
- ✚ When filing messages away, the list box and the message content box was not being refreshed. This is now fixed.
- ✚ Removed the Kodak scanner control from the project since we are not using the old method of scanning any more.
- ✚ The message form was not saving the action if it was never changed from the default action. This is now fixed.
- ✚ Logged a couple of extra counts in the client synchronisation processes.
- ✚ Fixed a bug in sending fax to do with approvers. It was not resolving the fax number from the contact list correctly.
- ✚ All of our forms should now carry our colour scheme. Let me know if you find any that has white background and I will fix it.

#### Colour Scheme

Text box	Some shade of green
Multi line entry fields	Dark pink
Combo boxes	Dark pink
List boxes	same colour as the text box
Source and target list boxes	Source in usual colour, target in dark pink
Disabled fields	Generally dark grey

#### ***Modification as at release 4.03.05***

- ✚ Synergy now allows inclusion of jobs from different matters into a single invoice as long as the billing debtor of the primary client of the matter is the same.
- ✚ Removed the client name from the invoice form (multiple matters, multiple clients).
- ✚ Attached all of the primary clients of the matter as the related client to the invoice document so that it can be viewed from any of those client's records.
- ✚ There is also a new table that records the invoice details for each matter. For example, if an invoice has jobs from matter A and B, then there will be two rows in ZZINVBK, one per matter, recording the sub-totals for each matter.
- ✚ Corrected the tool-tip text for the fax buttons (from "Briefcase" to "Send Facsimile").
- ✚ The entry field in for the clients in the message form was accepting lower case. This is now fixed.

***Modification as at release 4.03.03a***

- ✚ Changed application to allow scanning application to have command line arguments.
- ✚ Changed the Vision's UniqueID generation to include Vision's special character. All new creditors or debtors will have a UniqueID recognisable by Vision application. However, existing data must be fixed manually if required. Remember that both Vision and Synergy need to be fixed at the same time. Otherwise you will loose the link.
- ✚ Changed the MSDE form so that the maximum memory size is detected dynamically.



### ***Modification as at release 4.03.03***

- ✚ Added a security group and users to matters. Also added ability to nominate which users can be approver of a matter. The security groups and individual users will determine who have access to change the approver and other users of a matter and its tasks. The security rules form changing Approver, Assigned by, Secondary responsibility, and primary responsible users are as follow:
  - Security groups or individual users attached to matter:  
The person that is logged on to Synergy must either be a member of one of the security groups or must be listed in users list box in the security tab.
  - When global security group exists (company defaults, change matter approvers):  
The user must be part of this security group to have access to change the approver.
  - When none of the above security measures are present, that is there is no entry in the security tab, there is no global security group for the change of matter approvers, and then the user can change the approvers of the non-master matters. For master matters, the user must have an access level less than that set in the housekeeping for the matter deletion
- ✚ The above rules also govern who can manipulate the list of approvers, security groups and individual users of a matter.
- ✚ Added a new option to the popup menu of the home screen “Refresh User and System Settings”. Clicking on this menu item will renew the user and company settings. This is useful in instances when the system administrator changes the housekeeping or user setting and will remove the need for users to log off and log back in.
- ✚ Changed the “Bulk message” to “Email merge” in the CGE.
- ✚ Fixed one spelling mistake “relpies” to “replies” in the Add/Edit user form (Signature tab).
- ✚ Added a new security group for the maintenance of the stored queries. “Store Enquiry” and “General Client Enquiry” forms, now, check this security group for before allow maintenance and addition of new enquiries.
- ✚ When a client was being exported to the outlook contact book, the address source of the client was being populated in the comments field. In this version, we have created a new user defined property called “Synergy Address Source” in the contacts folder and the client’s address source gets populated in that field.
- ✚ A comment field has been added to the grapevine item so that people can put circulation notes. When the “Publish in grapevine” check box is checked, the user is given an opportunity to enter some circulation comments (Grapevine tab). These comments are displayed in the Grapevine tab of the workcentre when the grapevine item is selected. The comment can be changed by anybody until the grapevine item is approved. After this point, only the knowledge officer is allowed to change the comments.
- ✚ Beatified the mail dispatch centre. Changed the mail register list box to a fully sortable list box. Also displayed the send date in the list box.
- ✚ Also added a user list box to the grapevine tab of the workcentre that displays the list of users that should read a grapevine item. The date read will be displayed for those that have read the grapevine item and will be blank if the item is unread.
- ✚ Fixed “Invalid control array index” error that was generated from additional data form.
- ✚ Added a new report to Grapevine tab of the workcentre. This report prints the selected grapevine details along with the list of intended recipients and the date they have read it.

- ✚ STSynergy now supports SQL Server MSDE databases. This will only work for sites with 5-10 users. A new form allows users to maintain their databases, back the up, prepare maintenance plans etc. We have developed a basic database maintenance form that allows users to create new database, backup/restore databases, delete/rename and other necessary operations. This uses the free SQL DMO that is shipped with MSDE.
- ✚ Added two new options to the popup menu in the message form for the To, CC and BCC that allows users to copy all or selected clients from the recipient lists to the clients list.
- ✚ There was a bug that did not allow editing of distribution lists. This is now fixed.
- ✚ Added a new security group for deletion of tasks. Remember that if a task is a decision node, then the user must be part of both task deletion and the workflow maintenance security group to delete it.
- ✚ Made the business name optional when updating client information using import client form. Synergy was expecting the column name "BusiName" be present in the importation table. Having this column is optional now.
- ✚ Changed the behaviour of the **"Include time cost module"** check box in company defaults. If it is not checked, then the timesheet tracking is disabled regardless of the licensing. To enable timesheet entries you need to have this turned on. Having a time cost license will not turn this on automatically.
- ✚ Users can now add messages to their favourites list.
- ✚ Allowed system administrator to submit, approve and unapproved matters.
- ✚ Added user's name to the title bar of the MDI form after the company name.
- ✚ Added a new form that allows users to determine the discrepancy between the documents on a server folder and the entries in ST Synergy's ZZDOC table. This is accessible from documents tab of the housekeeping form. This form requires direct access to the document server as it needs to verify existence of the file on the document server.
- ✚ Added a **'Non-pending documents only'**, **'Documents without a client'** and **'Documents without a subject'** check boxes to the document search screen.
- ✚ Housekeepers can now process the log entries in ZZLOG. This functionality is available from the company tab of the housekeeping form.
- ✚ Changed the path relocation form. It now has three tabs and allows users to move the physical files to a directory as part of path relocation of documents and reports. There are more validations in place now since experience has shown that people forget to put the '\' at the end of the directories, which has serious consequences.
- ✚ Added a cancel button to the client synchronisation process and fixed an error in update process.

### ***Modification as at release 4.03.02***

- ✚ Added a security group for accessing the invoice documents. This will allow the users to change the content of the invoice document if the wording of the master invoice is not quite right. If a security group is not assigned for this, Systems Administrator is the only one that can do this function.
- ✚ The software has been modified to consider the above security group when launching/activating/finalising/copying the invoice document.
- ✚ The task form now allows users to check in documents from the documents tab. The selection buttons are now available from right mouse click. A question will be asked after the document is checked in and the user has an opportunity to cost his timesheet entry right there and then.
- ✚ IN documents tab of the Client Control Centre, the document entry was being removed from the list when one tries to finalise or reactivate the document and the process does not successfully complete. This could happen if the user says no to the confirmation message. The document entry is now remains in the list.
- ✚ Messages created from within a task now add the task to the task list of the message. Also when the time cost entry is added, the correct task is attached to it
- ✚ When searching for the task in the time cost form, the matter number is now enabled so that one can enter the matter ID directly without having to go through selection of a client.
- ✚ Added advanced document search button to the documents tab of the MCC.
- ✚ Added a properties button to the cost form the gets displayed from the Unbilled time of the MCC.
- ✚ The trading name label is renamed to Business name, which makes it consistent with everywhere else.
- ✚ Creation of messages from CCC now adds the client to the list of recipients if the client has an email address.
- ✚ Changed the list box in the documents tab of the MCC to a sortable list. Also displayed the reference number in the list.
- ✚ The notes field in the general tab of the MCC now has a label. The word "Notes:" used to be populated in the actual field itself.
- ✚ The task search form now includes matter reference number field.
- ✚ The active task descriptions are now displayed in bold font. The colour of the task is changed to dark blue and those of the documents are changed to green. Any complains talk to Helen not me.
- ✚ Added a new task tab to the communication form. This will allow addition of tasks to a communication directly. In previous versions, one would had to go to each task and then edit it and attach the communication from the communications tab of the task form. Please note that if the communication form is loaded from within a task, that task cannot be deleted from the task list.
- ✚ Added a "High priority tasks only" check box to allow filter by high priority tasks.
- ✚ Added the address source's title to Adhoc Report. The report needs to be copied to the SYSDIR on client sites.
- ✚ Changed the font colour from purple to dark blue on home screen and the sliding bar.
- ✚ Changed the boldness of the tasks that have passed their target date. They used to be displayed with bold red colour.
- ✚ Added a new report to the invoice tab of the MCC. It allows users to print the itemised list of an invoice.
- ✚ When exporting clients to outlook's contact list, a user-defined field is created and the UniqueID of the client is stored in that field. This helps updates to be done based on the identifiers rather than the full name. The update of the contact details was not working due to a bug in the Gateway DLL. This bug is fixed now and hence the contact details should be updated as expected.

- ✚ There were extra filing classification when a user was replying to a message. This is now fixed.
- ✚ The comment filed on the template form would only accept 250 characters. It now accepts about 65K. However, please note that only the first 250 characters will be copied to the description field of a document since this field can only accommodate 250 characters.
- ✚ There was a bug in the additional data reports for matters. When there were more than one type of additional data was selected for the report, it was generating an SQL statement error. This is fixed now. Client related additional data reports would have been working fine.
- ✚ A new setting in company defaults allows sites to define if they want their Synergy appointments to be synchronised with outlook.
- ✚ Added a new option to the diary popup menu for importation and synchronisation of the outlook appointments with those in Synergy.
- ✚ Added a new security group for Record Management Officers. This security group determines which users are allowed to maintain containers and folder. A new tab in the Workcentre allows these users to have access that is otherwise restricted to housekeepers.
- ✚ Fixed a refresh problem in the unbilled time of the MCC. When a matter with no unbilled time was being selected, the second list box with the detailed costing was still displaying the old data.
- ✚ Added filing clerks so that people can delegate the filing of their messages to others. Filing clerks can be added from the housekeeping. There is a new button in the workcentre that allows users to send their messages to the filing clerks. There is also a “Awaiting Filing” and “Sent For Filing” options in the message type combo. The first option will only be added if the logged user is a filing clerk and the second one will be added if the logged user has a filing clerk. These two options should allow the filing clerks to look at which messages need to be filed and the recipient as well as the recipients to look at if there are any message that have not been filed yet. Also added a new icon to the status bar that displays the number of messages that are awaiting for filing.
- ✚ Added a new security group for running the time cost reports.
- ✚ Added a combo box in report gallery for system reports. The options are to display time cost reports only, other system reports or all system reports.
- ✚ Add 7 standard reports for time cost accessible from reports gallery.
- ✚ Fixed a couple of bugs in the message ActiveX control to do with the selection and the popup menu.

### ***Modification as at release 4.03.01***

- ✚ Task form now has a button that allows users to create timesheet entries.
- ✚ Timesheet entries created for appointments are updated when they are changed. For example, if one creates an appointment, which is not related to any client and then later one, they edit it and add the client; the client is added to the timesheet entry.
- ✚ A check box is added to the documents tab of the work centre. This allows users to cost their timesheet entries when they are checking in the document.
- ✚ Spell checking on the emails were automatically done when they were sent. There is now a spell checker icon that allows users to do the spell checking whenever, they like and avoid having to go through the spell checking when messages are sent.
- ✚ Removed inactive users when selecting recipients for a message. Also made the search button visible so that one would have the same functionality as they had before.
- ✚ Changed the event handling so that when a new address book is selected, the cursor is set to the title field so that the user can start typing in without having to tab to the title field.
- ✚ The combo box in the recipient selection form now has icons.
- ✚ The search button is now enabled for internal staff when selecting recipients. This will allow us to emulate what we used to do in the old message form.
- ✚ The email addresses were not being processed correctly. It is fixed now.
- ✚ If the user has set up a default theme in email options of the word, Synergy will use the theme if the theme is installed (there must be a directory on C:\Program Files\Common Files\Microsoft Shared\Themes for the selected theme).
- ✚ From the work centre, the selected date from the calendar control is now used for creation of the new timesheet entries.
- ✚ Fixed a bug in replacing the users' secured directory.
- ✚ Added a recalculate button when editing the recovery hours for a user. It helps users to recalculate the hours rather than having to type them all. Also added a running total field that allowed you to know how many hours have been accumulated for a user.
- ✚ Changed the direction when replying to a message. If the direction is incoming, the replied message's direction will be outgoing which will be the case in 99.99% of the times.
- ✚ When replying or forwarding messages, the classifications stored in ZZRECFIL was not being copied to the reply message. This is now fixed.
- ✚ There was a type mismatch error when marking follow-ups as actioned. This occurred when you pressed exit button when specifying the next follow up date. This is fixed now.
- ✚ The time cost form now does not have the tracking part when adding manual entries. Also removed the filling of the task details when the timesheet type combo box entries are selected. One more change in this form is that the combo box entries are not selected by default and user has to manually select an entry.
- ✚ When defining the billing periods, the description is now changed. The following list gives the description for each period type:

Monthly	January, February etc
Quarterly	Quarter 1, Quarter 2 etc
Fortnightly	Fortnight 1, Fortnight 2 etc
Weekly	Week 1, Week 2 etc
Everything else	Period 1, Period 2 etc
- ✚ There was also a bug in billing period when calculating quarterly periods. It gave 3 quarters per year rather than four. This is now fixed.
- ✚ There was a bug in the chronology that allowed anybody to view appointments without checking the security. This is now fixed.

- ✚ Fixed the work in progress details in Matter Control Centre. It now displays any un-invoiced summary records. The double click now brings a separate form that displays comments and other details of each line item.
- ✚ Email signatures are now available for users. Each signature can be assigned to a specific type of email, eg signature for new emails, signature for replies and signature for forwarding messages. A given signature can be used for a combination of these as well. For example, a user can create just a single signature and use it for all three types of messages,
- ✚ When forwarding or replying to a message, the format of the message body now resembles more closely to that of outlook.
- ✚ When replying to a message, Synergy always asked the user if s/he wanted to include the original message. We have added a new user option that allows automatically including, excluding or just as before asking the user for inclusion of the original message text.
- ✚ The write-up button was not being enabled in Matter Control Centre. This is fixed now.
- ✚ The timesheet list in the Work Centre holds the sorting option now.
- ✚ When importing attachments from a message, the document name is now set to the name that appears in the attachment list (i.e. attachment's display name).
- ✚ Messages can now be secured to security groups and/or individual users. Printing of these messages, follow the same security consideration. If a message is secured in this way, the only people that will have access to the message are the sender, all recipients and all those in the security group or the individual users in the security list.
- ✚ The chart defaults have change to 2D bar graph. A couple of bugs were fixed as well.
- ✚ A new option in the company defaults allows users to remove all time sheet types that are linked to some task when adding manual entries.
- ✚ A billing debtor button is added to the task search form that is displayed when adding or editing the timesheet entries. This will help to locate a billing debtor of a client easily without having to search for them on the associates form.
- ✚ Remove the duplicate profiles displayed in the Matter search screen on profiles combo box.
- ✚ When printing a message, the list of documents is also available. Users need to include a field called DocList to the ZZMESSG.RPT.
- ✚ Fixed a couple of problems in the processing of the popup menu for documents in the message form.
- ✚ Added personal distribution list for email messages. These could be maintained from message form using the popup menu from the recipients list.
- ✚ When adding timesheet entries, the matters that are marked to be under review was not being listed in the task search form. They are now included in the list of selectable matters.
- ✚ Communication and message type templates have been added to this version. The existing templates are marked as document types templates. When creating new emails, the template selection form allows users to pick a message template, which then gets applied to the message.
- ✚ This version of Synergy allows users to attach documents that are not within Synergy's document management system to emails. These types of documents could be added to the attachments list when composing a message.
- ✚ There was an error in the task edit form. If the approver of the task was inactivated, it was not appeared in the approver combo box. Subsequently, when saving the task a type mismatch error was being generated. The code is changed to include the approver even if s/he is inactive.

### ***Modification as at release 4.03.00***

- ✚ Changed the task search form to search the active tasks when the In progress button is selected and the Approved and bulk approved tasks when finalised button was selected.
- ✚ Added the new interface for the message creation.
- ✚ Added email signatures for each user. They can set different default signature for reply, forwarding messages and new email messages.
- ✚ Added a new option that allows user to specify whether they want to copy the original message when replying or forwarding. This will allow the software to avoid asking this at run time.
- ✚ Fixed the problem with editing the follow-ups.
- ✚ Fixed a problem with editing and adding time cost entries.
- ✚ Added Go to client and Go to matter options in the popup menu of the timesheet tab in the WC.
- ✚ Added two combo boxes to the time cost form. These combo boxes will display all of the time cost types that are attached to a task. This will help users to narrow down to a specific task using the time cost types.
- ✚ The timesheet tab used to reset the list box when activated and set the selection to the first entry. This was creating problems when there were many items in the list and users had to scroll to find the one they were working on. The list box now reselects the entry when refilled.
- ✚ Double clicking the entries on the any of the two list boxes in the Work In Progress tab of the matter control centre will display the itemised costing for the selected entry.
- ✚ Fixed a bug in the user form in the housekeeping (performance tab) related to adding users.
- ✚ A bug was discovered in approving tasks. When a task was being approved, the status was changing but the approval flag was not being set. Consequently, the task when such tasks were loaded, everything was available for modification. The approval flag is set correctly now and hence the task will not be available for any changes when it is approved.



***Modification as at release 4.02.03a***

- ✚ Changed the task search form to search the active tasks only when the in progress button is selected and the approved or bulk approved tasks when finalised button was selected. Any other status must be searched using the task status button.
- ✚ Fixed the problem with editing the follow-ups.
- ✚ Fixed a problem with editing the time cost entries.
- ✚ Fixed a problem with mail merge from CGE.
- ✚ Stopped timesheet entries being costed to approved matters or tasks.



### *Modification as at release 4.02.03*

- ✚ Added a new column for client synchronisation process.
- ✚ Fixed the message form. The internal users tab is now set as the current tab.
- ✚ The documents are now checked in before being finalised. This used to be two separate processes. I still think that it should be separate, as it will certainly warn the user to ensure that the document is not open on an editor. Nevertheless, the users have accepted any stuff up that is resulted from this.
- ✚ Changed the document creation from the task form. It used to attach the document to the old task as well as the new one. This is changed so that the document is only attached to the new task until they come and say that they want to put it back the way it was. Only the create button in the documents tab of the task form does this. Everywhere else, the document tasks are copied.
- ✚ Fixed refreshing of the question form.
- ✚ Fixed a few problems in the favourites tab in the work centre. There was a problem with the display of the documents. If a document had multiple classifications, then depending on the category and type it may have caused error 35602 “**Key is not unique in collection error**”. This is now fixed.
- ✚ Removed the external id from the filing classification drop down.
- ✚ Changed application so that when the user logs on to a company, the additional data DSN gets created.
- ✚ Added a new DSN **UserDefinedReportCompanyDSN** that can be used to link tables from a company into user defined reports. To use this, crystal report type documents must be associated with the predefined OLE crystal report application in the housekeeping. If you use the default file association, the report will not work.
- ✚ Displayed the reason for making a decision in task form. The question, answer and the name of the staff member are appended to the comments field by the software.
- ✚ Added a new form to the housekeeping that allows people to change person responsible, secondary responsibility, approver or assigner of a matter.

### ***Modification as at release 4.02.02***

- ⊕ Fixed a bug in creating bulk matters from client group enquiry.
- ⊕ Fixed a bug in path relocation.
- ⊕ Added the secondary person in charge to the matter history table.
- ⊕ Added a launch button to the favourites tab of the work centre.
- ⊕ Fixed a bug in the answer form. It was not populating the reason from library text.
- ⊕ Added an edit button to the keywords tab of the document properties form.

### ***Modification as at release 4.02.01***

- ✚ Fixed the addition of extra timesheet record when checking in documents.
- ✚ Fixed a bug in document security. Document will be considered checked out if the check in process fails.
- ✚ Added the client synchronisation process. Like document server process, this server can run on demand and will synchronise the client data from ZZSYNCLI into ZZCLIENT.
- ✚ Address source's postal address is now being stored in ZZFRZADS because of the client synchronisation process. With this client synchronisation process in place, the synchronisation of the address source and the address dependent is no longer the responsibility of ST Synergy if the address dependent is a debtor, creditor or contact.
- ✚ Added some redundant fields to the Word merge table with "\_\_\_\_\_" as field name. This will help to separate the different categories of the fields. For example, there is a separator between the client information and the address source information.
- ✚ Added the address source's postal address to merge table.
- ✚ Added a new option to company default to capture the default reason for client activity change.
- ✚ Added two check boxes to the accounting setting in house keeping. One checkbox allow users to indicate whether they want the intersection tables to be deleted. The second one is only for CIS system that allows the reverse synchronisation of the client data from CIS to Synergy.
- ✚ Added a new field to the ZZMATTER called secondary responsibility. This allows users to indicate who is actually doing the job
- ✚ Changed the Matter tab of the CCC to have a check box that allows switching between the primary and secondary person responsible for the job.
- ✚ Removed the merging of the BPR registration and status information into documents.
- ✚ Fixed an error in addition of new users. It was asking you to set a timesheet approver for the user. We set the timesheet approver to the user himself.
- ✚ Fixed a bug in deleting users.
- ✚ Added two new replacement symbol type, association and document. These will allow users to replace a replacement symbol with an associate's title. Also the document type allows users to insert one document inside another document. The normal replacement symbols are processed before documents being inserted.
- ✚ Fixed a bug in creating new company. It will now create default GL and Tax codes.
- ✚ Fixed a bug in document security. The check out record was being deleted if the check out process was unsuccessful or the user bailed out. The check out record is now left in place if the process was unsuccessful. Also ensured that when the document security is not implemented, the secured directory is not checked for the existence of the document.
- ✚ Modified the path replacement form so that when the document server's name changes, the system administrator can fix the users' secured directories.
- ✚ When time cost entries are approved, the selected task for the time cost entry is attached to the document, communication etc. This was being done when the time cost entry was being costed. It would cause a problem when a time cost entry was costed against a task by mistake. In this case the code attaches the task to the document or other entities. However, when the user corrects the entry and costs it against the correct task, the previously attached task to the document etc remains attached and there is no reliable way of detecting this.
- ✚ Added a template id to the select filing template form. This form is displayed when scanning documents or searching for templates from other areas like importation.
- ✚ Added import button to the pro-forma and documents tab of the task form.
- ✚ The time cost entries carry as much information as we can find when they are added. For example, if the entry is added from a task and user rate and other details are

available, the entry will have the costing details so that the user will have to just press approve if he/she is happy with the details.

- ✚ Added the address source name and occupation when client information is exported to outlook contact list.
- ✚ Ported the STViewer.exe to work with Crystal Reports Version 10.
- ✚ When selecting “Go to client” or “Go to matter” from the timesheet tab of the workcentre, the CCC or MCC was only being displayed if the timesheet entry was costed. Changed so that if the timesheet entry was not costed, the CCC or MCC was loaded with the original client or matter.
- ✚ There was a bug in creating a communication template from an existing communication. This is fixed.