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.
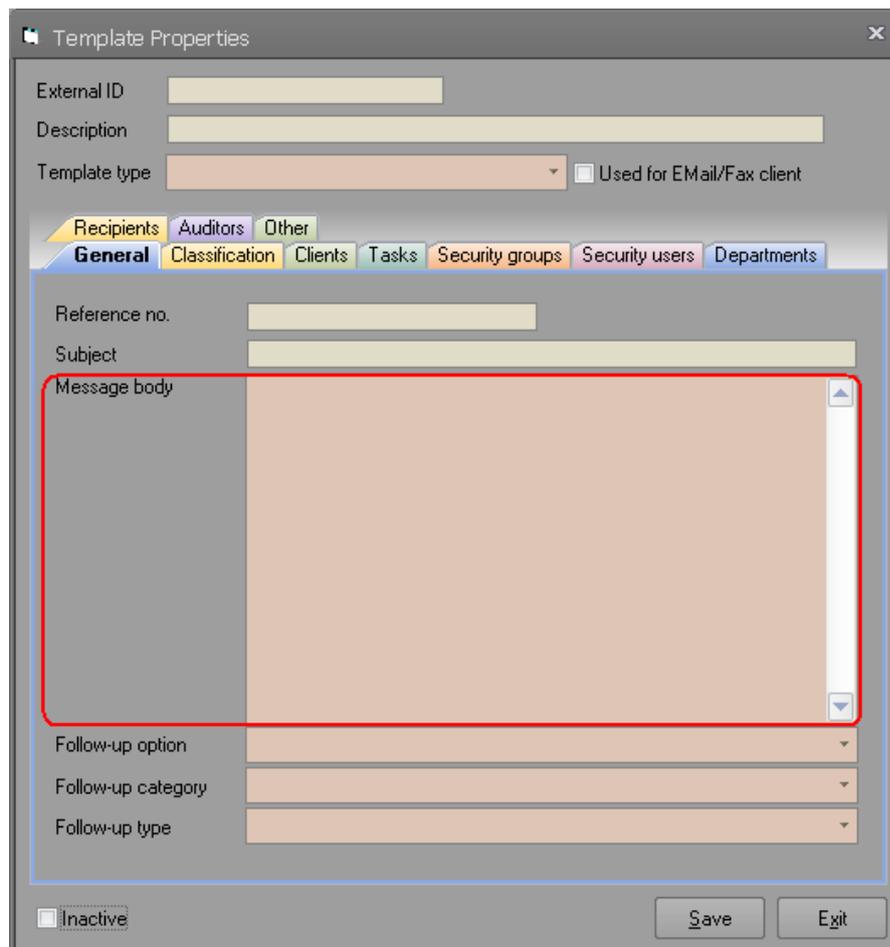


2)      Many of our clients had requested the ability to track the movements of users within security groups for audit purposes.  We have added this feature to this version of Synergy.  From this version on, any user added or removed from a security group will be tracked in a separate table with the 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 time
Please 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.
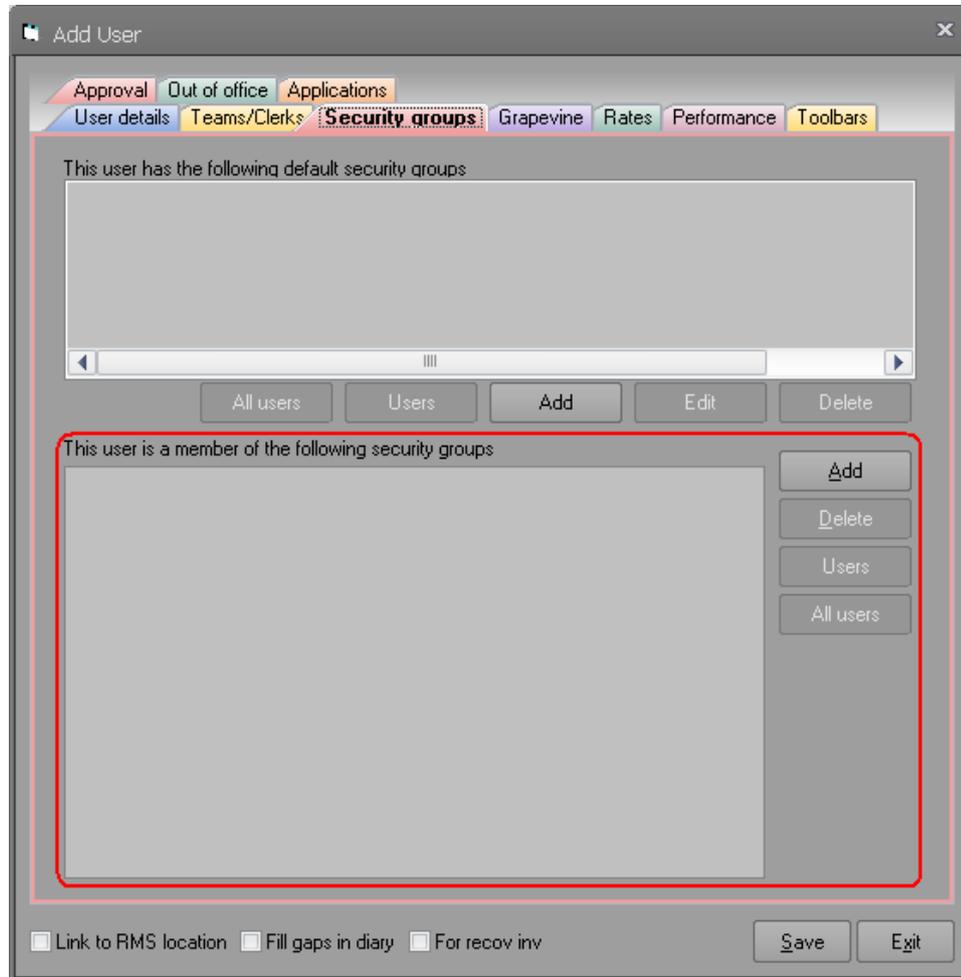


3) To further enhance tracking of user movements within security groups, we have enhanced Synergy to track usage of the security groups from the Company Default form. From this version onwards, any changes to the security groups used in this "Security Groups" tab of this form will be tracked. The following 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.
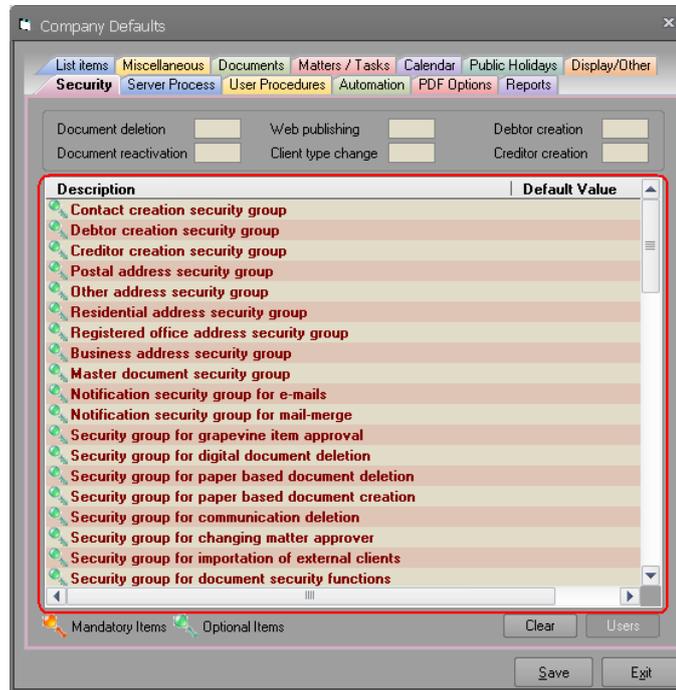


4)  We have allowed replacement symbols to be planted into a template message body. The replacement symbols can be filled by asking the creator of an email to use an additional data table. This way, the data placed into a message body can be based on accurate data from the Synergy database reducing the possibility of incorrect information is entered in the message. This can be done by linking an additional data table to a message template.
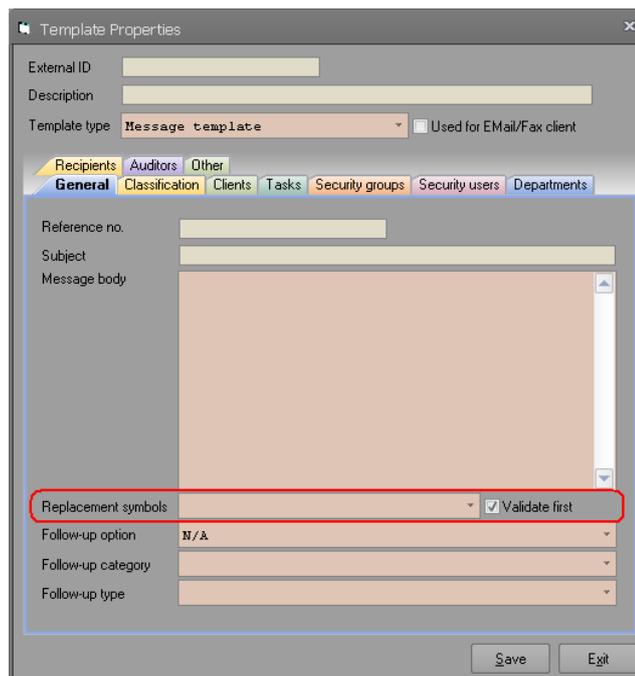
Once the additional data is linked to the message template, it will be used during the message creation to accept information to be replaced in the message body. You can optionally specify whether Synergy should validate the additional data table against the entity that the message is created from by 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.
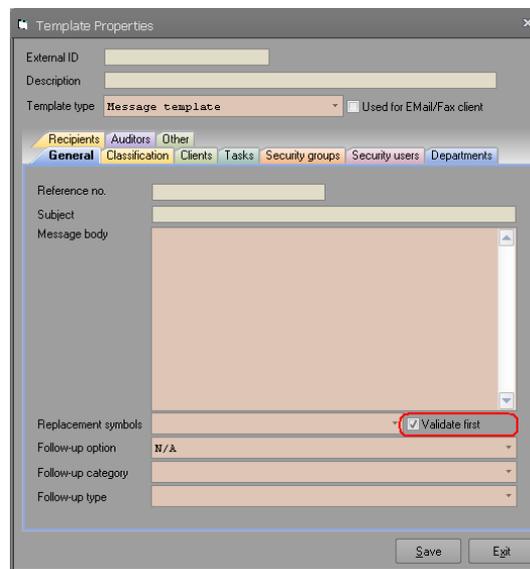


Please note that only the active additional data columns will be displayed for the data capture. When creating a message, Synergy will also check the exiting additional data of the client/matter. If it determines that there is exactly one additional data row already captured for the selected entity (client/matter), 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.
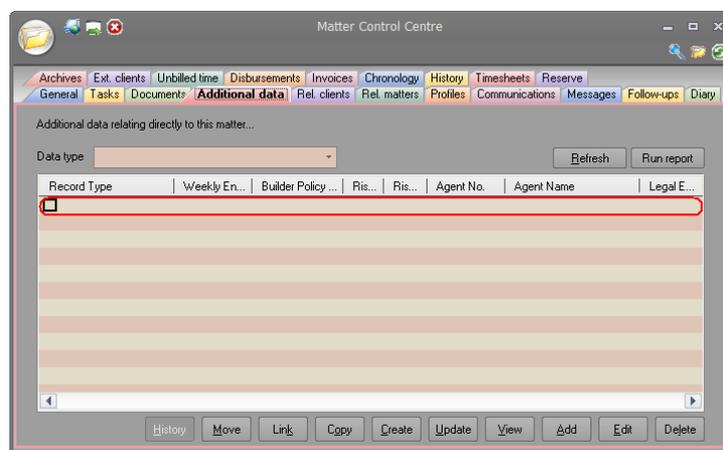
Please note that when existing additional data rows are detected, the user must have view access before the data is displayed. Please ensure that users that will be using replacement symbols for messages do have view access to the additional data table used as replacement symbols.

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.
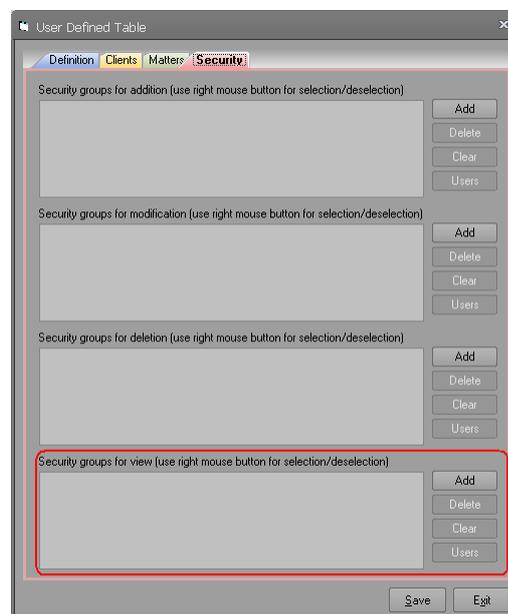


5)    We have added an extra filter to the chronology tab of Client Control Centre, Matter Control Centre, and Task edit form. This extra filter will allow filtering by direction. Please note that direction is only relevant to dispatched items, documents, communications and messages.
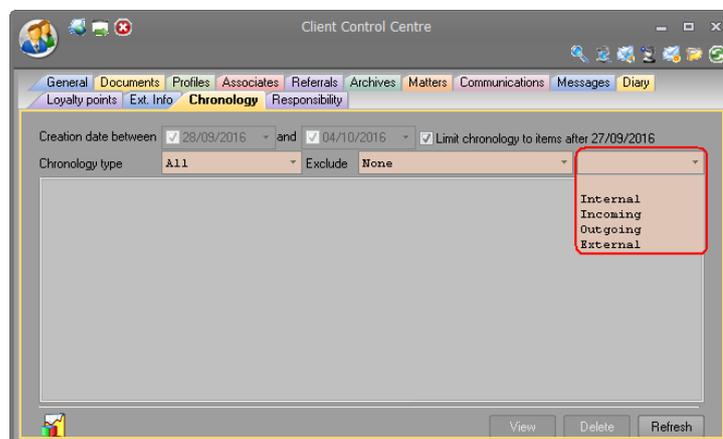
6) When importing messages, Synergy only checks the sender of the message and links the clients with matching email address to the list of clients. We have added a new setting in Company Defaults called, "When importing EMails, auto-link recipients as client using their email address". When this setting 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).
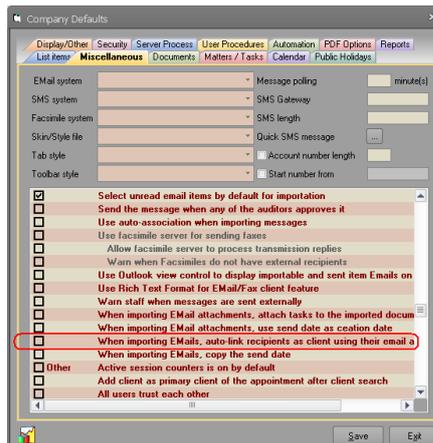


7) When importing messages into Synergy, they will be marked as incoming emails. In some cases, despite us discouraging this, users send messages from outlook and later on they import those messages into Synergy and then file them properly. In such cases, an incoming direction for email is not correct. 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.
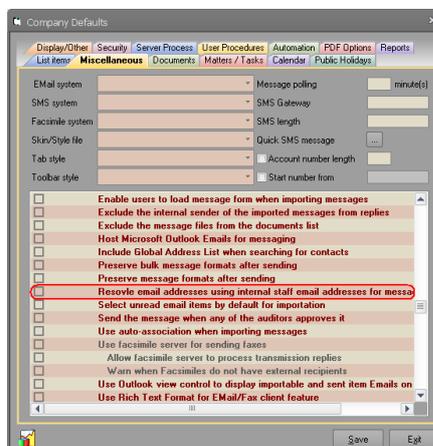
8)  In many places, we use our own user control to display text, date, numbers etc. In these places, when users were changing DPI setting, our user control were not displaying correctly in some places as indicated in the following image. In this version, we have fixed our user control and have made it DPI aware.
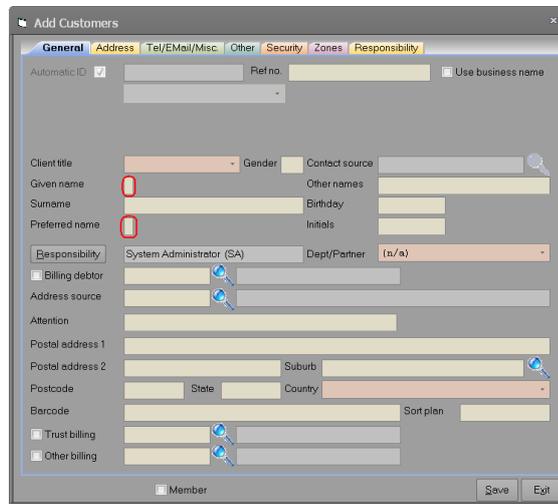


9)  This item was removed.
10) We have fixed a bug in setting matter budgets. When users were accessing some of the popup menus from the disbursement or time budget tabs, the budget amounts were not calculating correctly in the matter budget table. This is fixed now.
11) We have also fixed our costing 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.
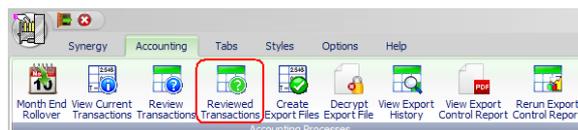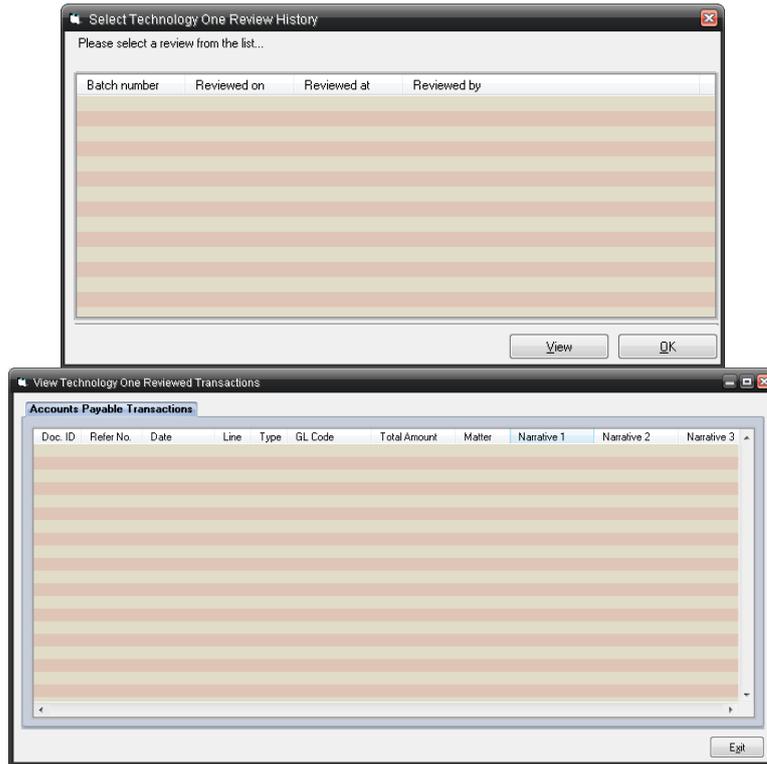
15) Fixed a replacement symbol related bug in document properties. Copy button was only meant to be available when the selected symbol was defined as literal. It was also not checking the maximum limit for number of symbols.
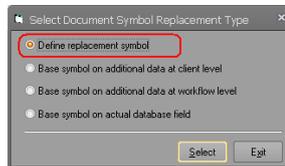


16) We have added two new buttons that allows users to set the mandatory setting for highlighted or all selected symbols on document properties form.
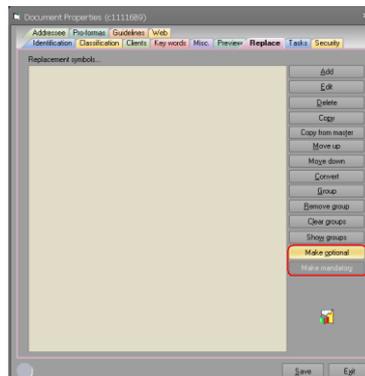


Multi-selection of list entries was only available for grouping of the replacement symbols. Because of this change, we had to always allow list entries to be multi-selected. Please note that the grouping process will automatically remove invalid selected entries from the process.

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.
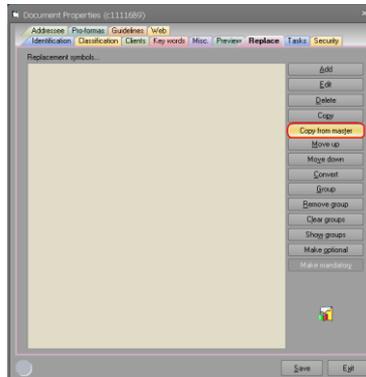


18) The symbol replacement edit form was removing the grouping in some cases. We have changed this so that grouping will only be reset if the replacement symbol type is changed
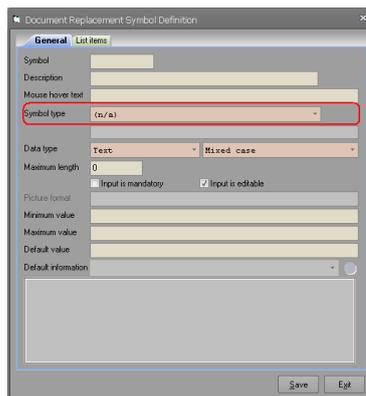


19) We have fixed a bug in list items tab of the document replacement symbols. When users were editing a document replacement symbol with entries in the list items, these entries were not getting displayed in the list. As a consequence, it they clicked the save button, they were loosing all these list 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.