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.
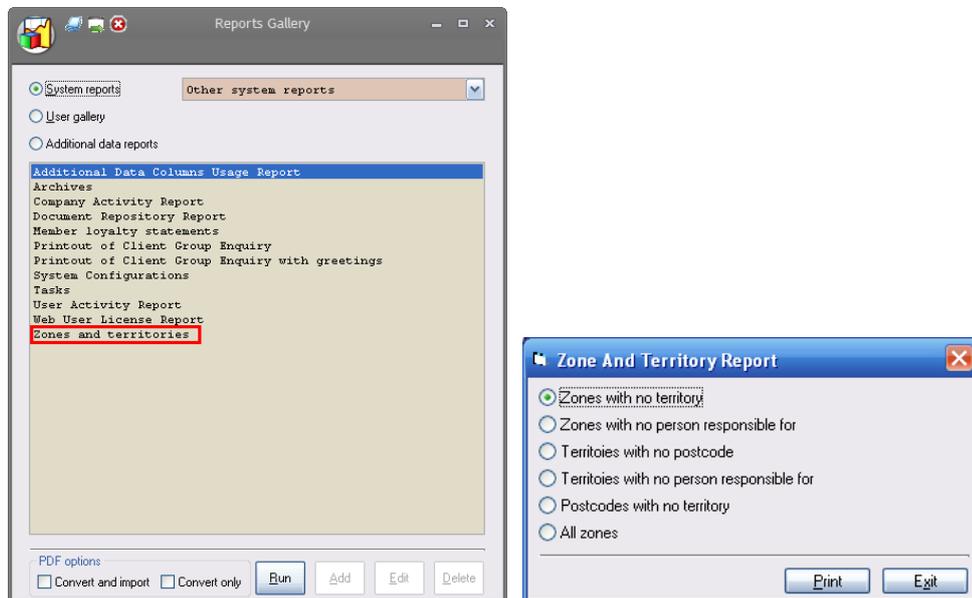

2)   When decisions are involved in a matter, to simplify the master matter setup, many clients have decided to share questions among different master matters. In these scenarios, there may be cases where not all answers are relevant for a specific master matter. Synergy had no feature to allow such 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.
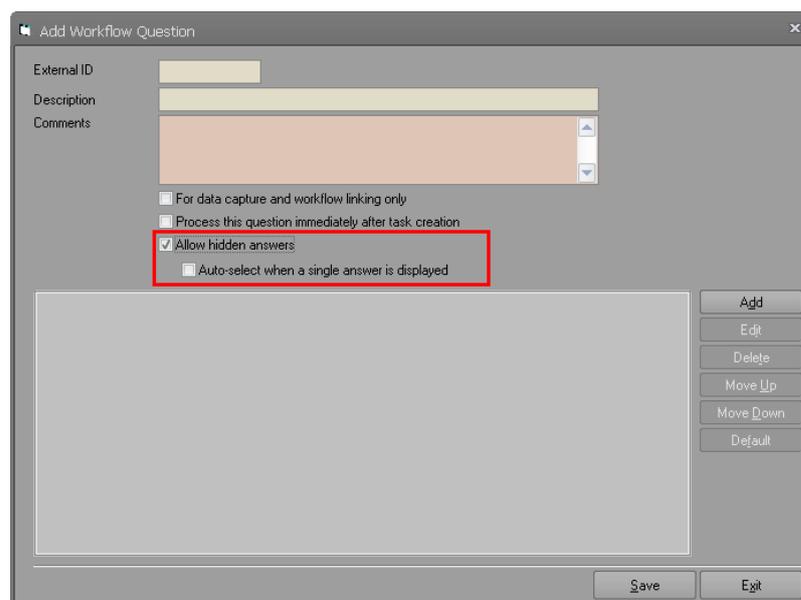
By hiding answers, it is possible to end up displaying a single answer on some matters. In this case, given that there is only one answer, administrators may want to auto-select the answer to streamline the workflow process rather than forcing users to click the save button. To allow Synergy to do this, 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.
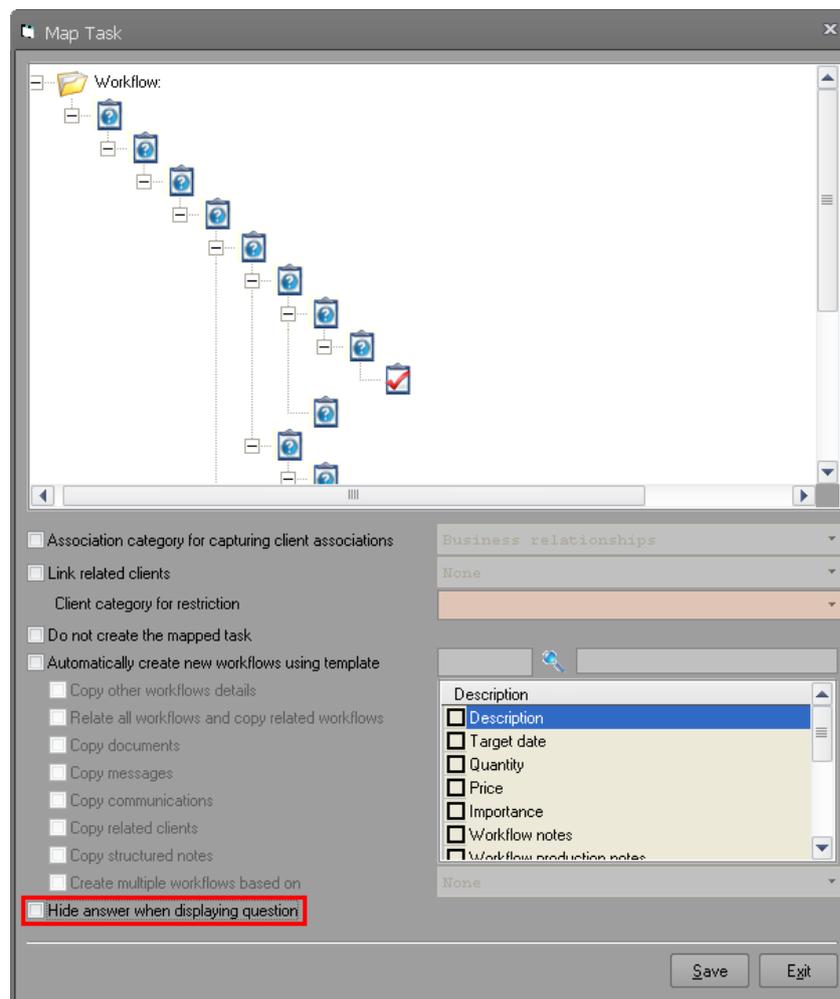

3)   In previous version, when a decision task leads to multiple data capture questions, when users were clicking on exit button from the answer selection form, Synergy was proceeding with asking the other questions. In this version we have placed a setting in company defaults form that allows Synergy 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.
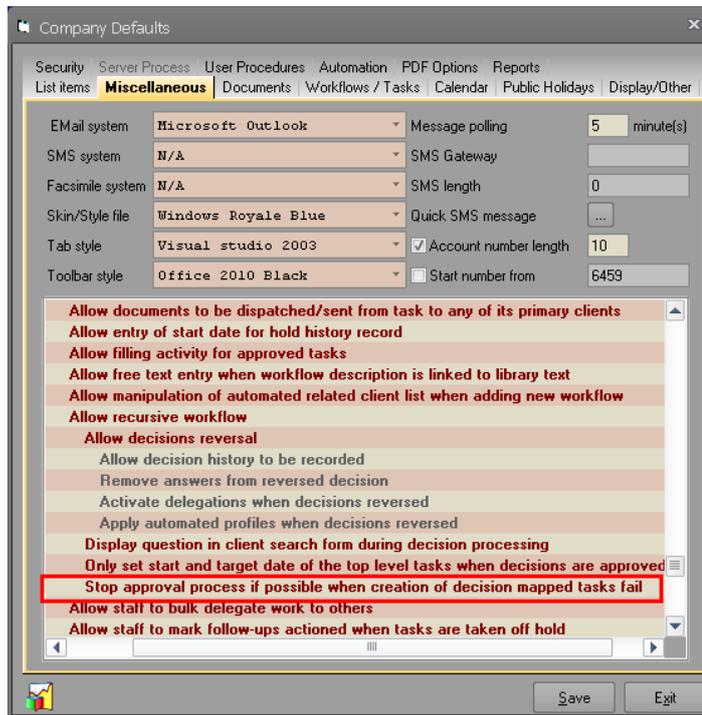
4)   We have added ability to track some user activity such as running queries, reports, exporting data to external files either from Client Group Enquiry or from the displayed reports. To enable this feature, you will need to specify which Synergy users need to be tracked by selecting a security group in the company defaults form.
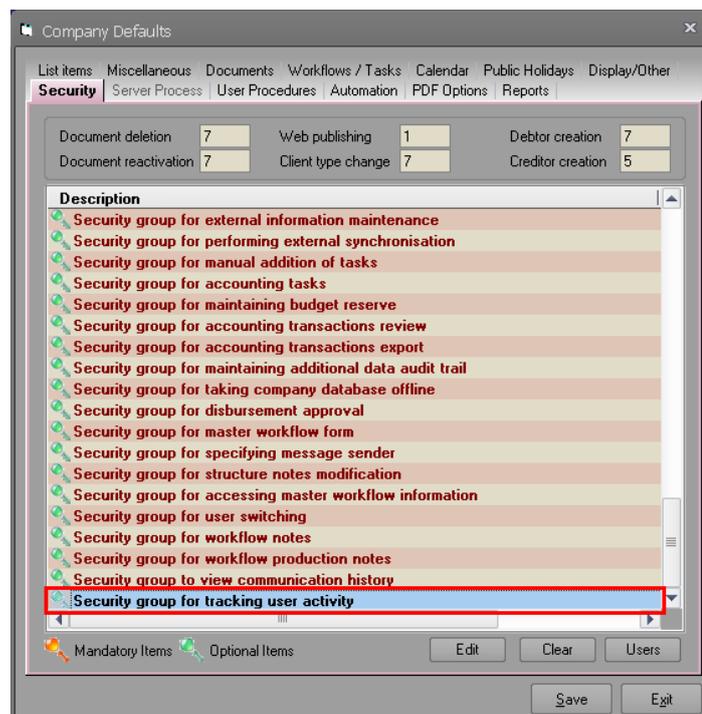
Once the security group is selected, you can then specifying a limit. The limit indicates the number of records that needs to be extracted or viewed before Synergy writes that activity into the database. By default, no one will be tracked unless this security group is set up by the administrators. Obviously, this would be extremely useful to identify those that may have malicious intent of extracting company data without anyone's permission.
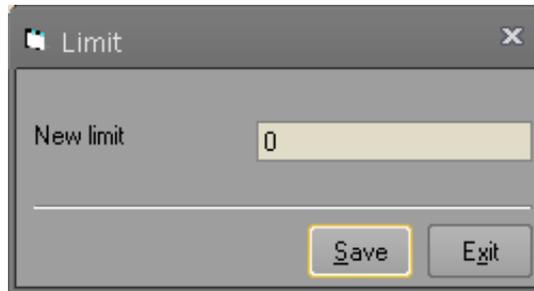

Please note that when this feature is turned on, any printing or data export from displayed report are also tracked. To stop users from closing Synergy application first and then exporting or printing the reports, when the user closes Synergy application while s/he has reports displayed, a warning message 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.
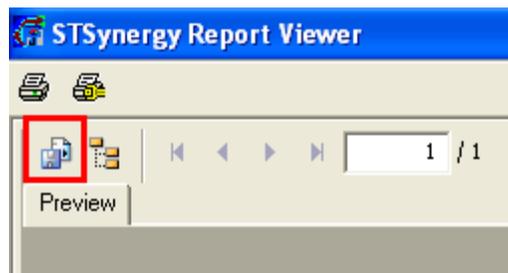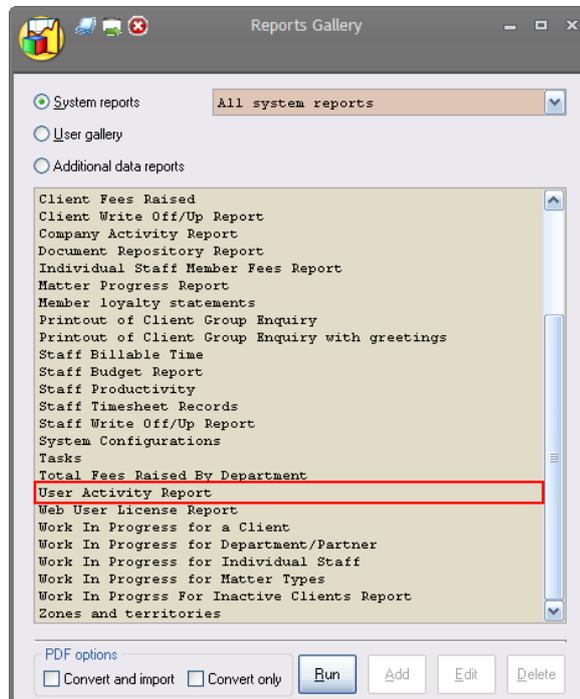

Crystal Report Export Button
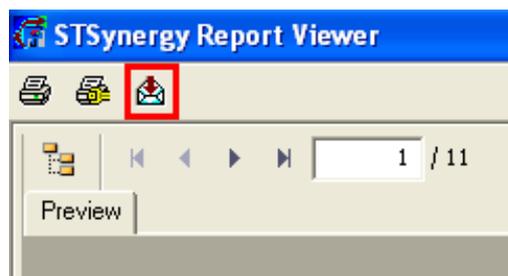
Synergy Toolbar Export Button

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 to much to fit into an A4 size paper.

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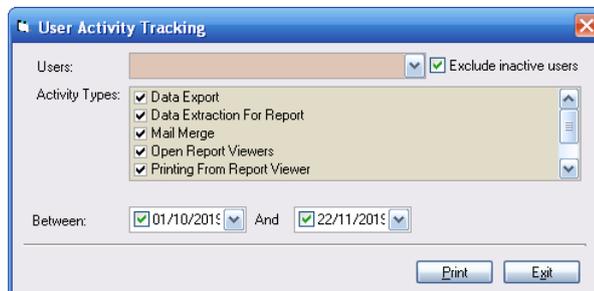
The start date will default to the beginning of the previous month and the end date will be set to current date. Also all the user activity types will be selected by default. A drop down also allows the administrator to select a specific user or all of them. A check box also allows removing of inactive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

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. Whit 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.
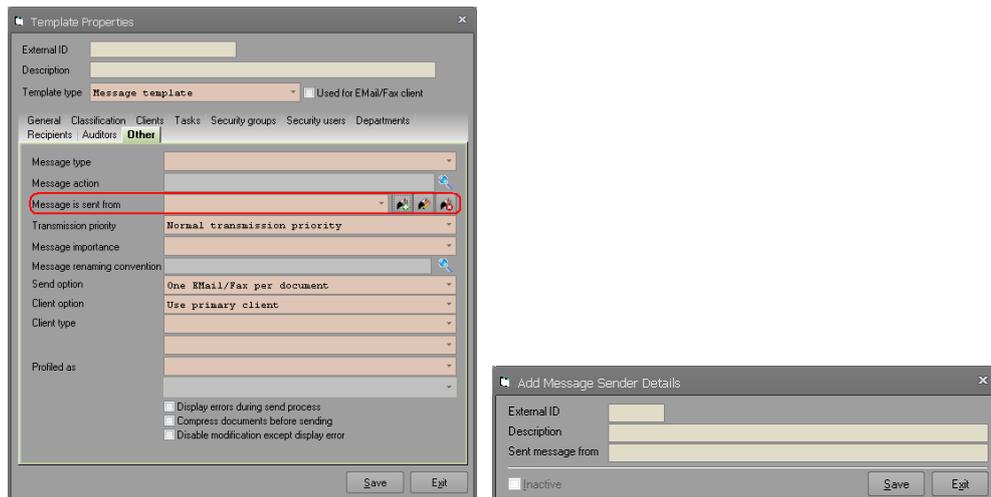
8) When importing data from external sources in Client Group Enquiry, it was only checking the client's current account number. So if someone exports a list from Client Group Enquiry and then attempts at importing the same list a few days later, only clients where their current account number has not changed will be imported to the list. This has been fixed by checking account number history.
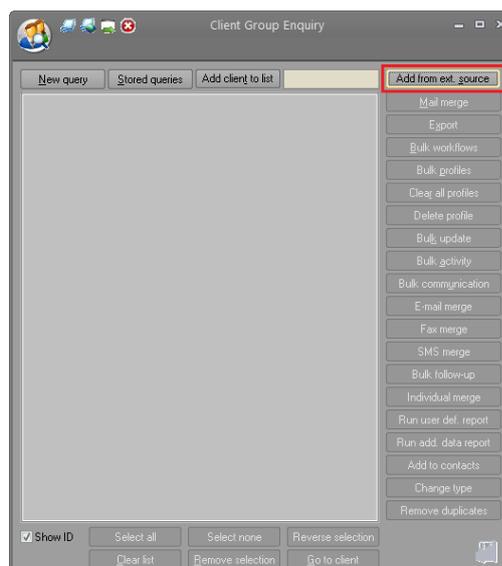
9) We have fixed a few minor bugs in our Software Development Kit. As part of these changes, the some API signatures have been amended. Mainly, some parameters are now passed by reference rather than by value and vice versa.

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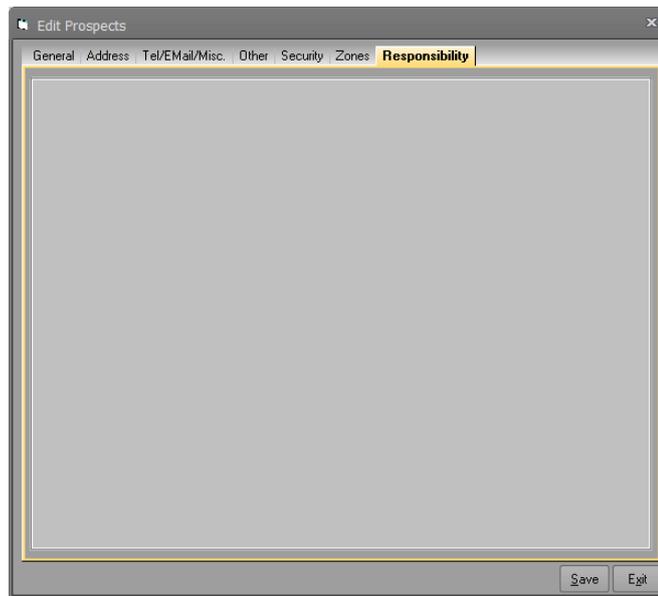
10) The main client edit form was displaying a member check box even when loyalty module was turned off. This check box should now be properly made invisible until the loyalty module is turned on.

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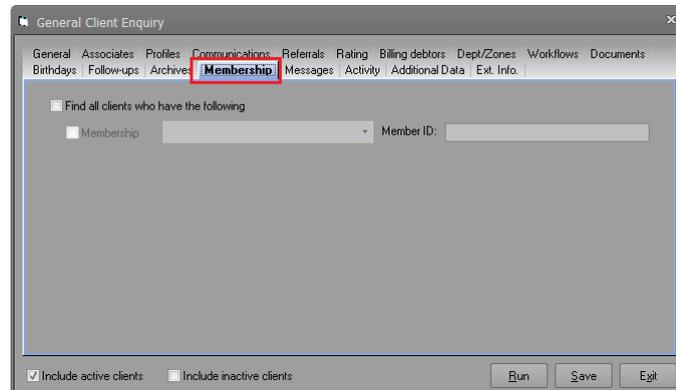
11) We introduced ability to group additional data columns inti a group and fill all of them by selecting data for group header. There was bug that allowed sites to inactivate the group header which would cause the group header to be removed from the additional data form. In this case, users would be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

Additional Data columns with group header active

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.
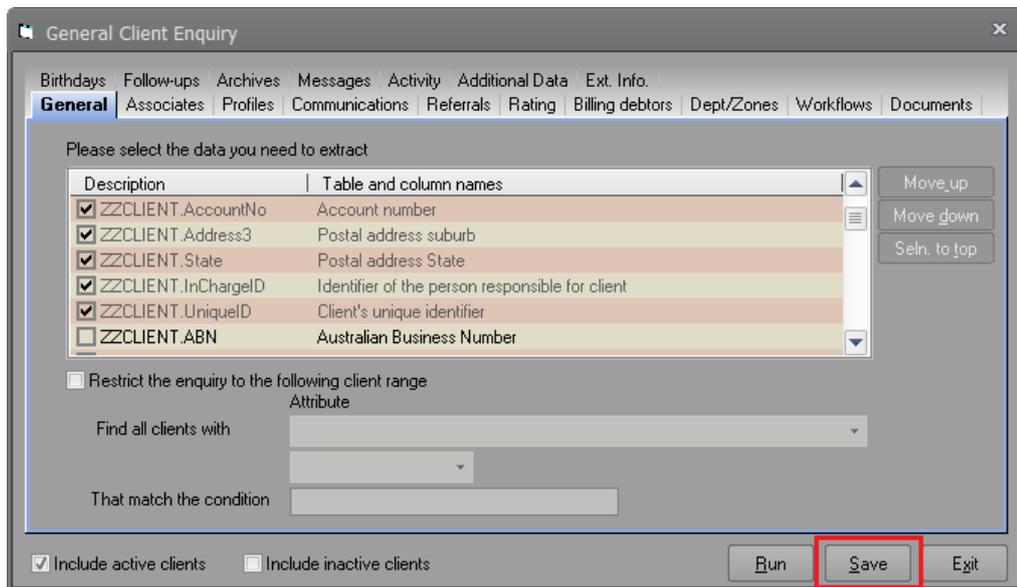
Enquiry from when user has security clearance
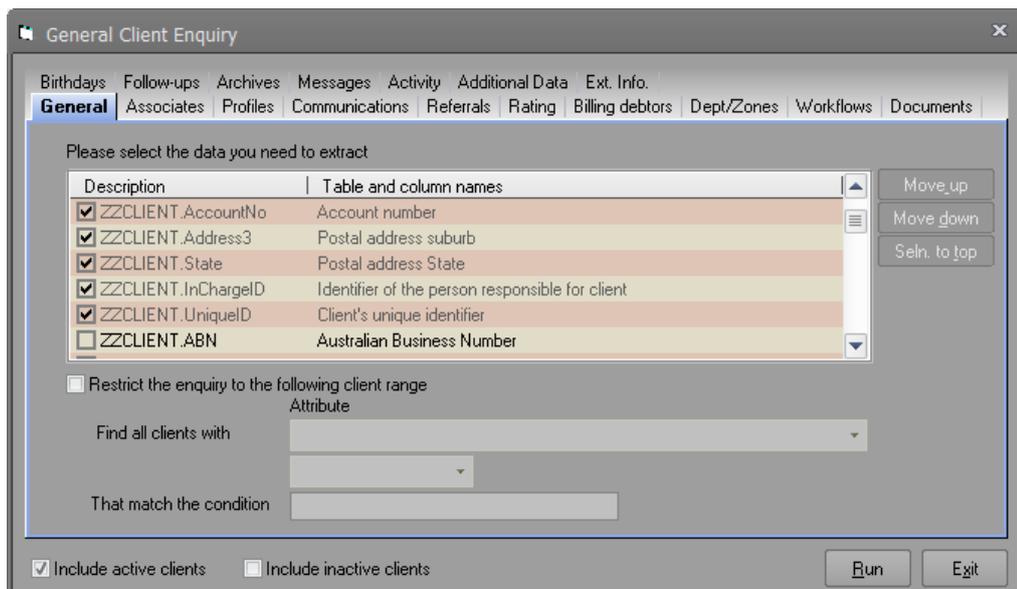

Enquiry from when user does not have security clearance

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.
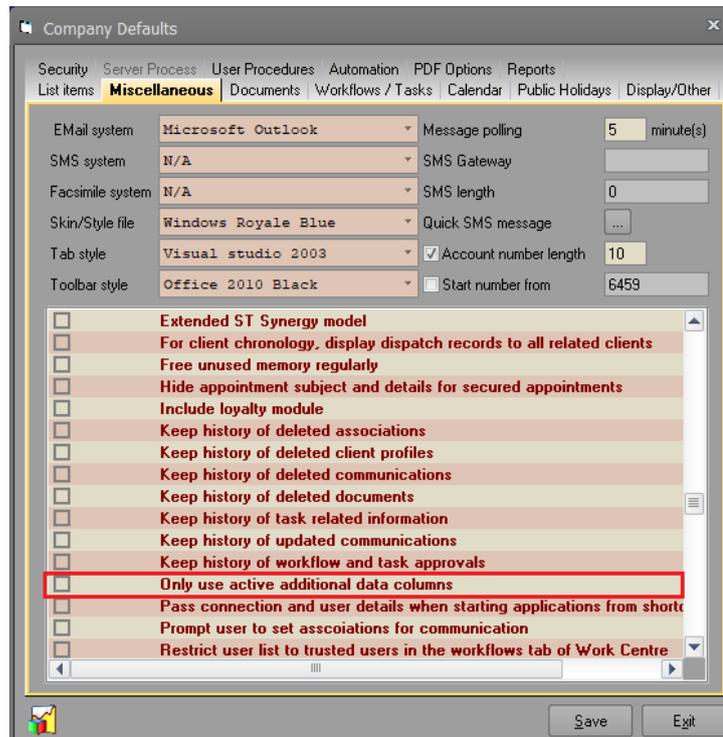

We have also allowed finer configuration at each additional data table level. If you want to configure this at each additional data table level, turn the global company wide setting off and then turn on/off the following option at each additional data table level based on your requirements.
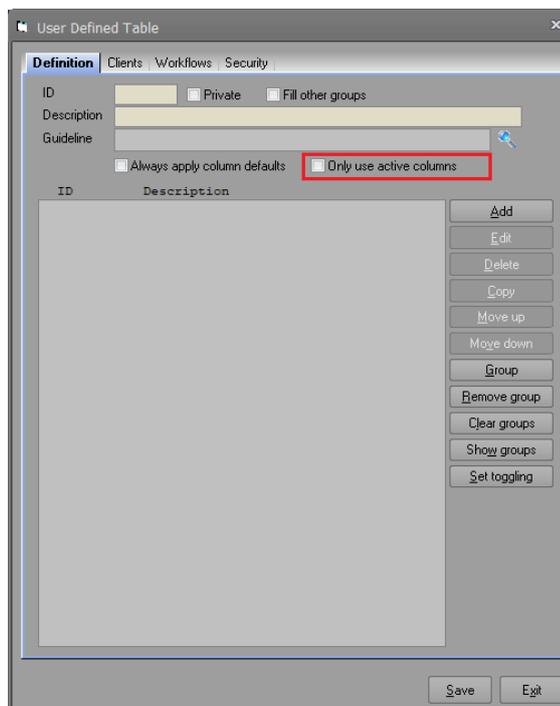
Once the configuration is set, the inactive columns will not be displayed in lists, add, or edit forms or any other additional data processing.

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.
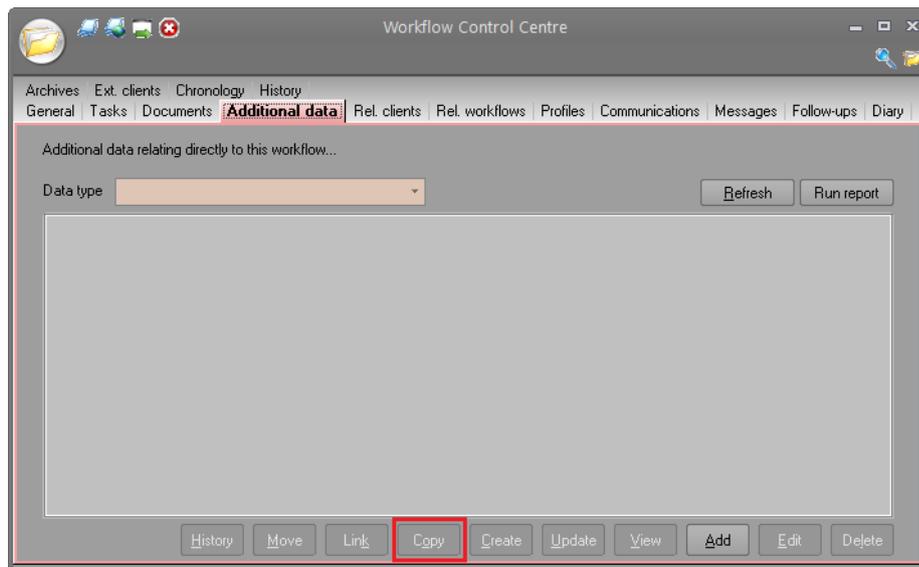
Synergy was also leaving the list entry when moving it to another client or matter. This would only happen if you do not tick any items from the list. In this instance it would move the highlighted item but in moving this item, it was not using the correct list index for removal. This bug has also been fixed.
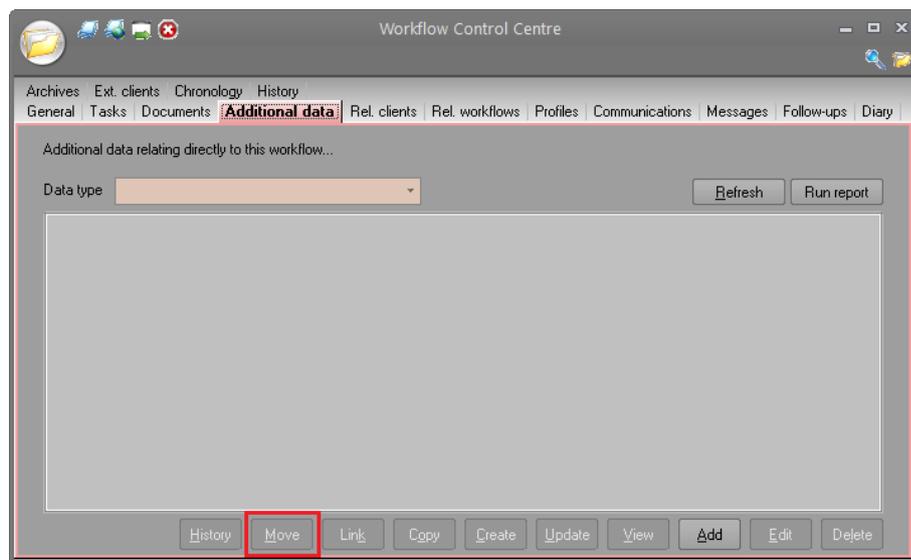
15) We have changed the way profile category drop down gets populated in matter search form. In previous versions, it was simply displaying all the profile categories that were linked to matters. This meant that when you select a specific matter type, the profiles were not filtering to display only the 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.
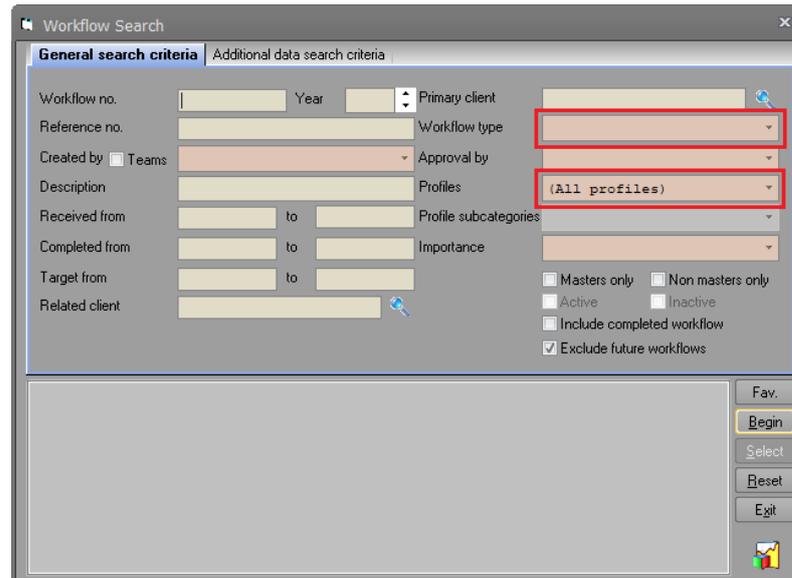
16) When exporting additional data from housekeeping form, Synergy was not providing any feedback as to how the process was progressing. On sites with large amount of data, the user could not have a feeling of when the export may finish. We have added feedback by means of displaying progress via progress 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.
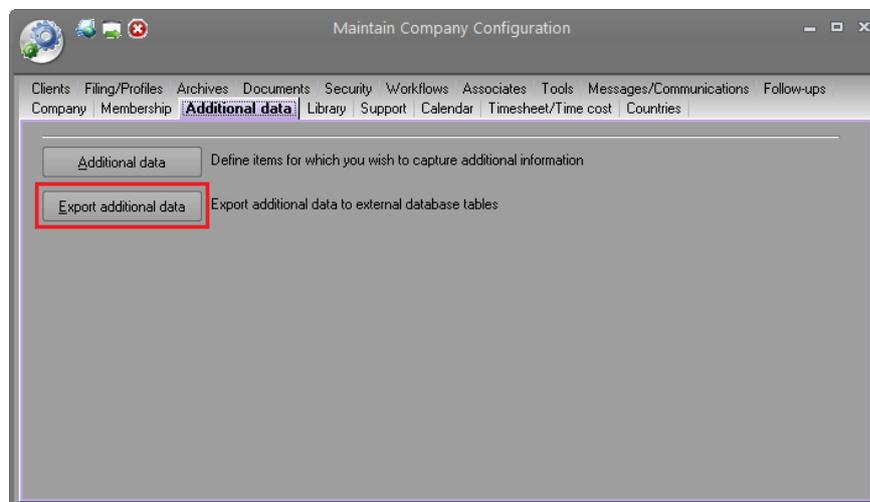
17)   We have sorted the skin and toolbar drop downs alphabetically.