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.
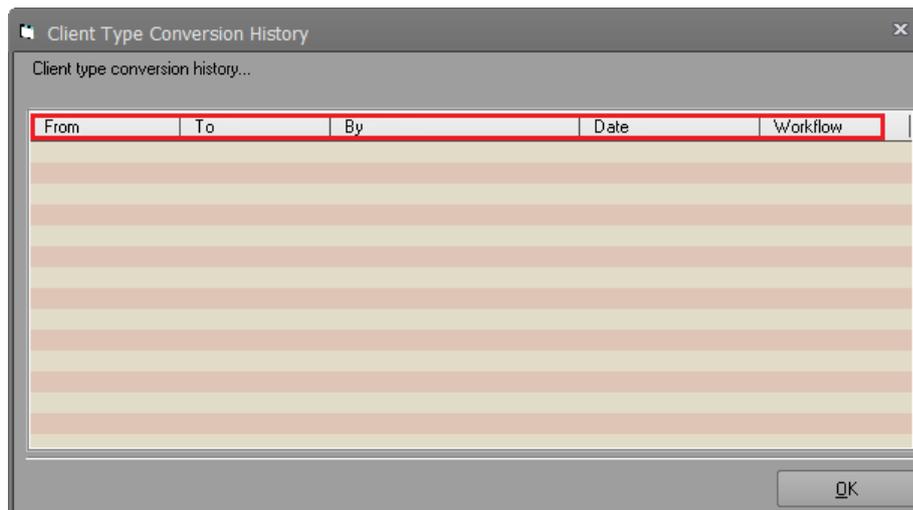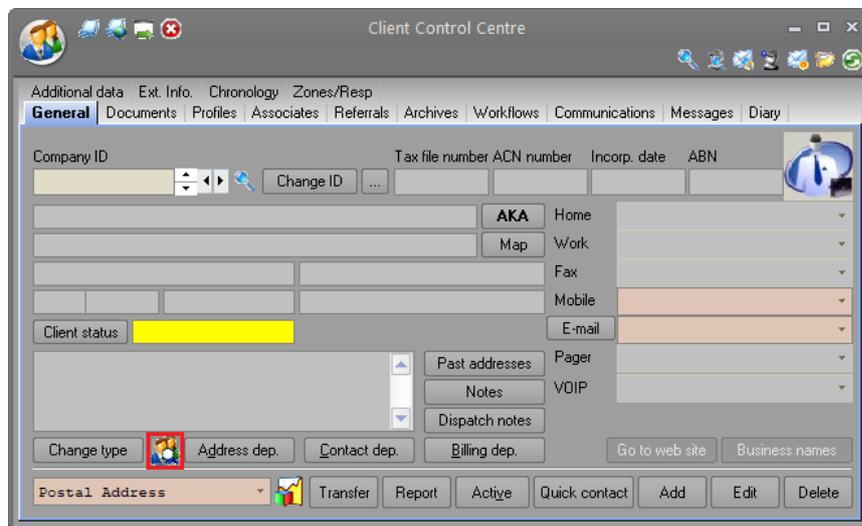

2)   Customers may not want to track client conversion history for all client types. Only a handful of client type conversions may be of interest. To indicate which clients type conversions should be tracked by Synergy, Software Development Kit and Client Synchronisation program, Administrators will

need to edit the client type from housekeeping and check the **Keep history of client type changes from/to this type** check box.
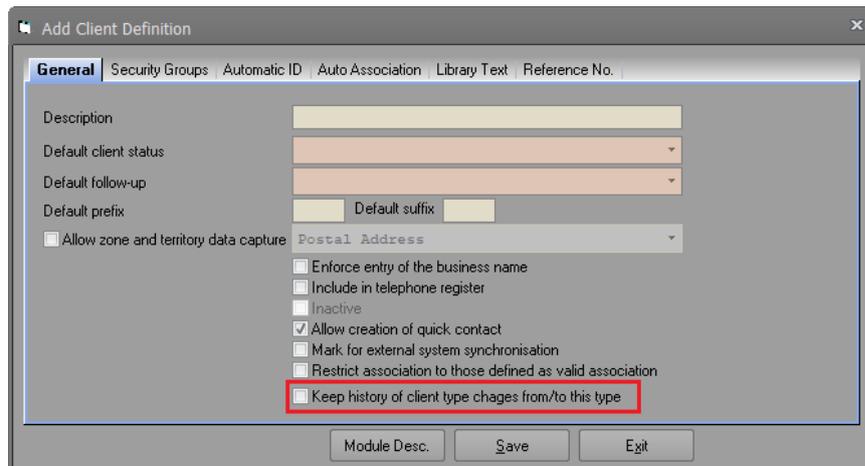
Once this is done, a history record will be written in the following cases:

- 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.
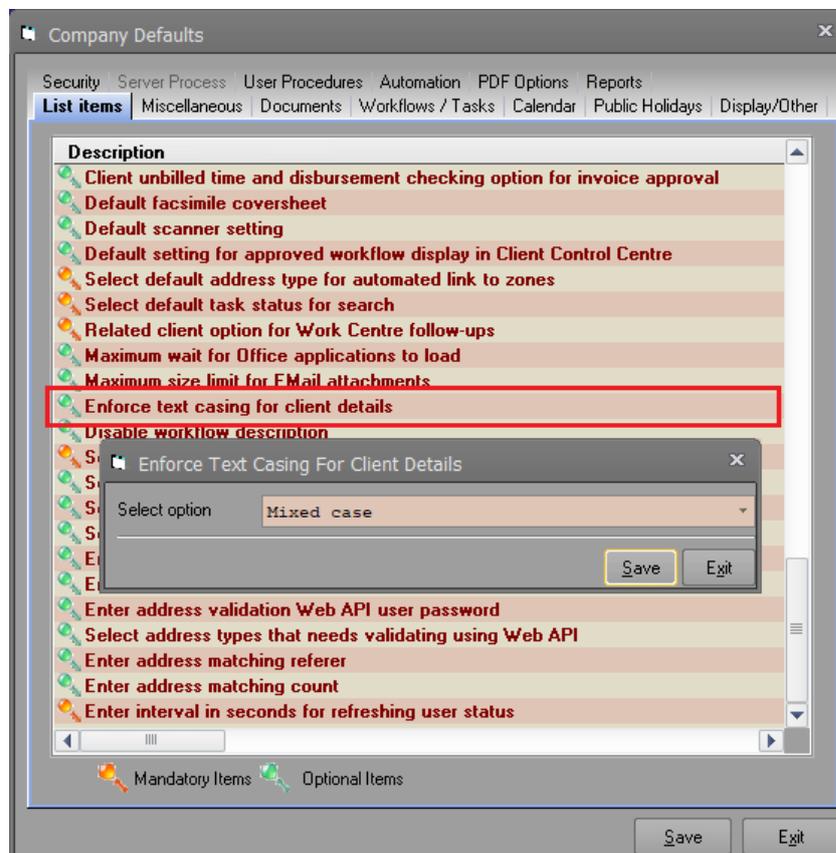
4)   Synergy allowed library text to be linked as the source of matter description as well as the client name. It also allows the very same library text to be used as the source of additional data fields. Some customers wanted the ability to match the matter description or client name when they were 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.

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.
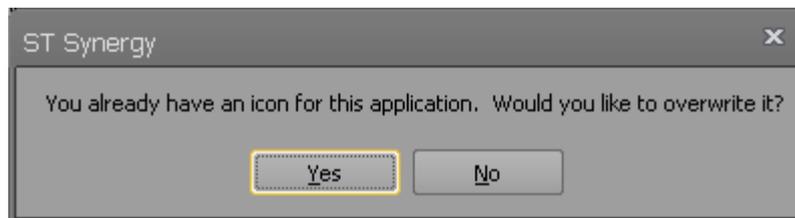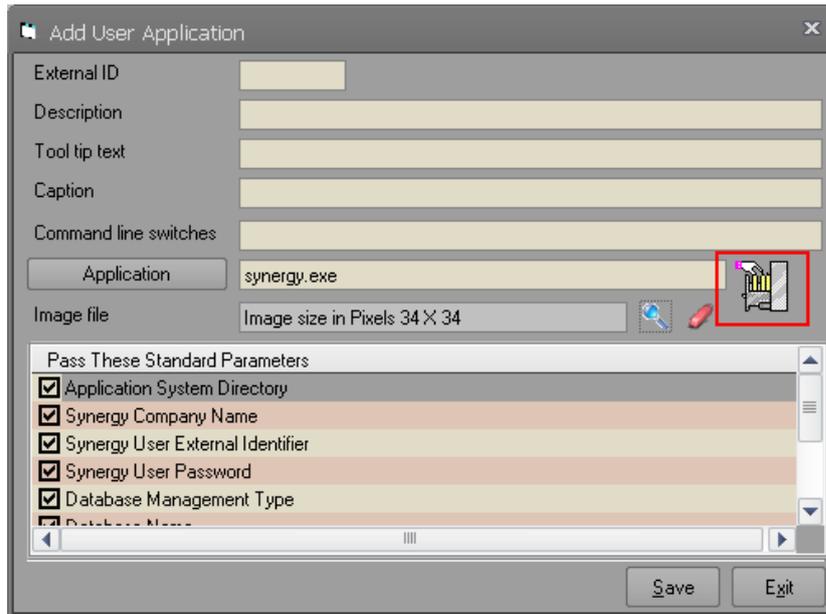

6) We have made some changes for additional data field history as follows:

- 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.
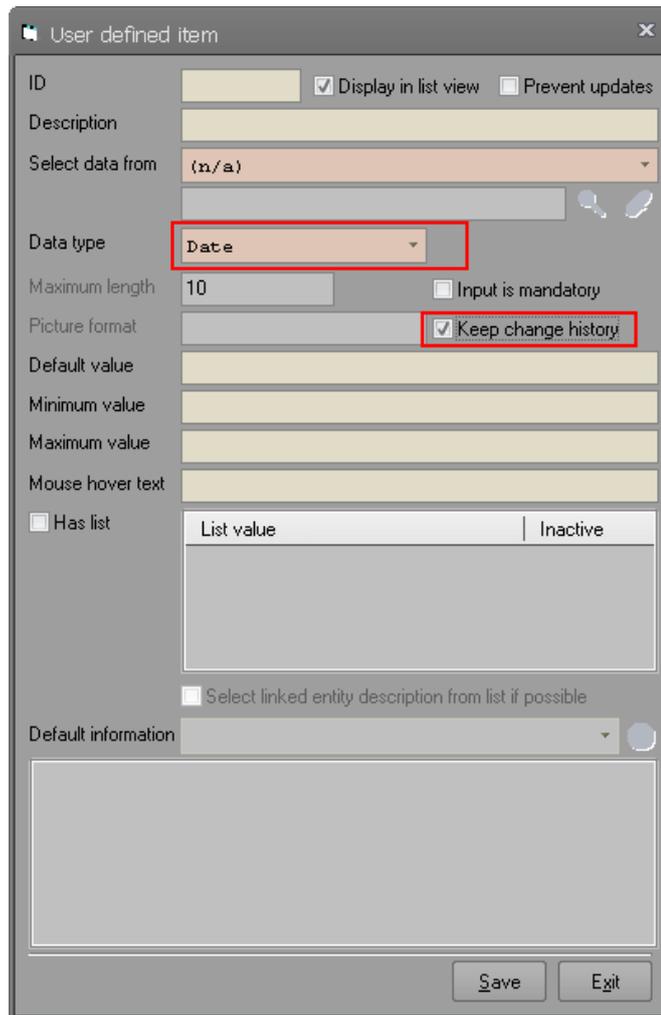

7) We have made the company upgrade form resizable as well as adding the SQL Server name to the list.
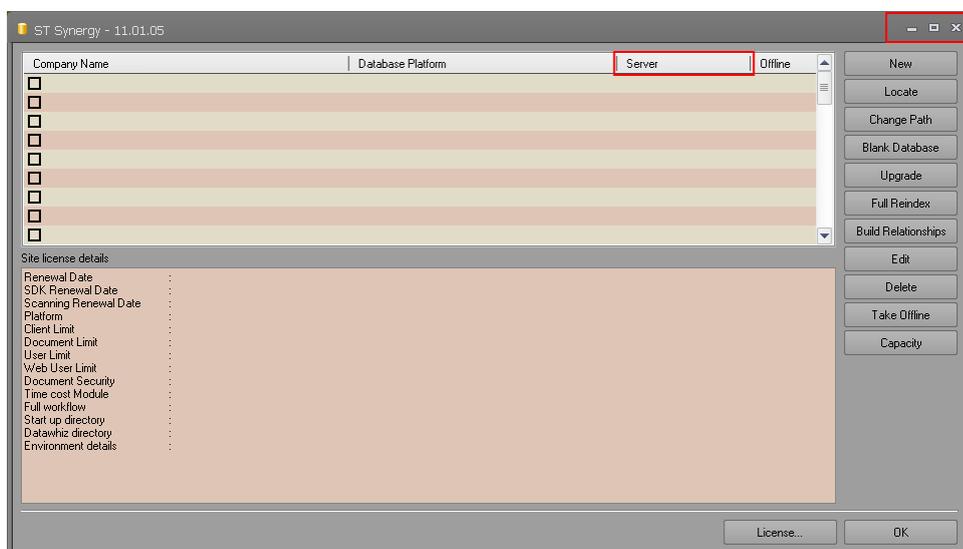
8) When additional data columns had list values, the validation of value was not working correctly in cases where data was being imported from external sources. This validation was not trimming spaces and also was considering casing which is not the original design was meant to do. We have changed the 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.
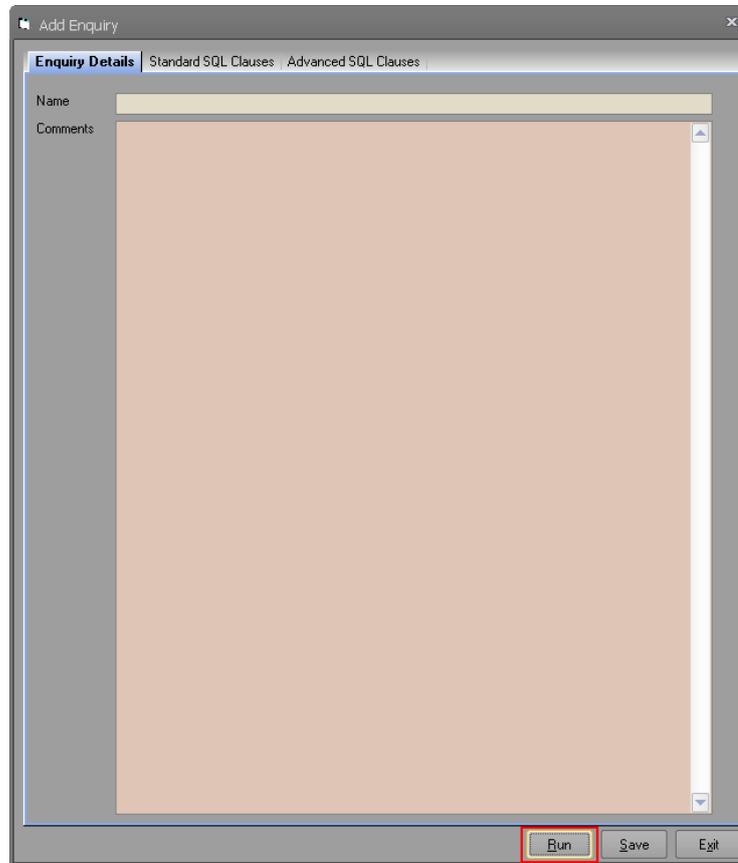
11) The first and last contact details in the communication tab of the Client Control Centre were not refreshing as users were adding/editing communications. This has been fixed.