RELEASE NOTES



Version 2.1 Build 145



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INTRODUCTION

This document outlines all new functionality and enhancements that users have requested, that have been introduced since **Drive Version 2.1 Build 80. DRIVE Version 2.1 Build 145** is the latest release of DRIVE and is now available to download from the Relate Website. This update contains all the functionality listed in this document. Please take time to read the notes and apply the update.

If you have any queries, please contact software support on support@relate-software.com or call +353 1 4597800 ROI.

If you have any further changes you would like to see in Drive CRM please send an email to <u>enhancements@relate-software.com</u>

Important

Please note it is very important that before running any database update you perform a database backup. Relate Software always advise that your practice takes regular backups in order to minimise any loss of data.



REPORTS

There have been a number of additional updates made to the existing reports as well as the introduction of some new reports.

CLIENT REPORTS

CLIENT BALANCES

- Client Source is now available as a new column selection and Sort By option.
- The Job Type field is now available as a column selection and sort.
- The Client Department field and Job Department field is now available as a column selection and sort option.

CLIENT AGED WIP

- A third Sort By option has been added for Client Name.
- The File As field is now available as column selection and sort by option.
- The Job Type field is now available as a column selection and sort.
- The Client Department field and Job Department field is now available as a column selection and sort option.

CLIENT AGED DEBT

- The File As field is now available as column selection and sort by option.
- The Job Type field is now available as a column selection and sort.
- The Client Department field and Job Department field is now available as a column selection and sort option.

CLIENT DEBTORS RECONCILIATION

- Two additional Sort By options have been added for Job Manager and Job Department.
- We have also added the option to include or exclude Draft bills when running the report.
- The Client Department field and Job Department field is now available as a column selection and sort option.

CLIENT FEES TURNOVER

We have added the filter 'Client Source' and Sort By options for Turn Over Descending, and Turnover Ascending.

JOB LISTING

We have added Date Set, Date Set By and Date Set By Name as available column selections. This information is pulled from the Job Detail Practice tab.

CLIENT WIP LEDGER

The Job Type field is now available as a column selection and sort

CLIENT FEES LEDGER

The Job Type field is now available as a column selection and sort

CLIENT WIP RECONCILIATION

The Job Type field is now available as a column selection and sort

CLIENT BILLING RECONCILIATION

The Client Department field and Job Department field is now available as a column selection and sort option.

WRITE-OFF REPORT

- The Write-off date is now available as a column selection.
- The Job Department is now available as a sort by option
- Batch No is now available as a column selection

STAFF REPORTS

STAFF TRANSFERS

We have added Staff Department as a Sort By option

STAFF RECOVERY

We have added an option to select 'Use Bill/Write off Date 'when running the report.

STAFF TIMESHEET CONTROL

- We have added Utilisation % as available column selection. The formula applied here is: Chargeable Units / (Target Units Non Productive Units).
- Status selection is now available when running the report.
- We have added an option to select 'Use Bill/Write off Date 'when running the report.
- We have added options for Passed / Unpassed/Both when running the report.



STAFF TIME SHEET WIP ANALYSIS

Two additional Sort By options have been added for Rate Ascending and Rate Descending. Status selection is now available when running the report.

WEEKLY TIMESHEET SUMMARY

Status selection is now available when running the report.

MISSING TIMESHEETS

Status selection is now available when running the report.

WIP REPORTS

WIP TRANSACTION LISTING

The File As field is now available as a column selection and sort by option. The Job Type field is now available as a column selection and sort.

WIP TRANSACTION LISTING BY STAFF

The Job Type field is now available as a column selection and sort

FEES REPORTS

BILL & CREDIT NOTE LISTING

- The File As field is now available as column selection and sort by option.
- The Job Type field is now available as a column selection and sort
- The Client Department field and Job Department field is now available as a column selection and sort option
- We have added options to sort and include Drafted Bills, along with name of the staff member who drafted the Bill/Credit Notes. To view the bills which are not yet signed off, select the option 'Include Non-Approved Bills'.
- VAT Number and VAT Code is now available as an option when running the report.
- We have added a checkbox 'Proforma Movement' in the report, which if selected, will display the Standard Bills which were originally recorded as Proforma Bills, and where Month (Original Date) <> Month (Transaction Date).
- The Bill Partner\Manager\Lead Staff is now available as a column selection and sort by option.



BILL & CREDIT NOTE BACKING REPORT

We have introduced a new option Show WIP Balance. This option will be ticked by default.

BILL & CREDIT NOTE ALLOCATION ANALYSIS

We have added the filter 'Department' and Sort By .

AGED DEBTORS

- The File As field is now available as column selection and sort by option.
- The Client Department field and Job Department field is now available as a column selection and sort option.

AGED DEBTORS (BY NOMINAL COST CENTRE)

Detailed now displays the Job Code where there is no job split

DEBTORS CONTROL REPORT

We have added an option in the Debtors Control Report to include Non Approved Bills so that Report may be generated to consider the Draft bills.

BANK AND CASH REPORT

RECEIPTS DISCOUNTS LISTING

The Client Department field and Job Department field is now available as a column selection and sort option.

FINANCIAL REPORTS

BALANCE SHEET/ PROFIT & LOSS STATEMENT

The following column selections have now been added;

- Budget Period
- Variance to Budget
- Budget Year to Date
- Variance to Budget Year to Date
- Prior Year to Date Variance



NEW REPORTS

BILLING INSTRUCTION SHEET FOR APPROVAL

We have added a new report called Billing Instruction Sheet for Approval which lists the WIP billed by staff along with a form with approval details. The user may take a print out of the report and get manual approval from respective authority. To access the Billing Instruction report, select Reports » Fees Reports » Billing Instruction Sheet for Approval.

Billing Instruction Sheet for approval								et for approval Relate Software L					
)/S WIP as a	at : 31-D	Jec-15											
Client	ANTO	L	Antiques (Universal) Limited			Client Par	tner	LIP				
Date	(-	DocNo		1	Bill Amount	WIP Billed	Profit/Loss	Recovery	%				
01/1	2/2015	RB006			1,000.00	1,000.00	0.00	100.	00				
01/1	1/2015	R8005			1,000.00	1,000.00	0.00	100.	00				
01/10	0/2015	RB004			1,000.00	1,000.00	0.00	100.	00				
01/0	9/2015	RB003			1,000.00	1,000.00	0.00	100.	00				
01/0	8/2015	RB002			1,000.00	1,000.00	0.00	100.	00				
Job Code		Bill Amount	B/F Accrued WIP	O/S WIP	WIP Alloc	W/O	C/F Accrued WIP	Profit/Loss	Recovery %	Unpassed Time			
AUD06			-453.75	-453.75						0.0			
CTAX06			0.00	210.00						0.0			
MC06			0.00	2,655.00						450.0			
Total			-453.75	2,411.25						450.0			

The report contains a form as below which should be completed by the staff member and the signing authority for approval.

Billing Action

Invoice Value from Column A	
VAT @ %	
Total Billed	

Notes to approver

ctions Is	the Client Take on Complete - Yes or No			
Drafted by	Reviewed by	Approved by	Signed Off	

CASH ALLOCATION

We have enhanced our report section by introducing the Cash Allocation report. To access the Cash Allocation report, select Reports » Fees Reports » Cash Allocation. This report will show the allocations.

Cash A	llocatio	n Report			Relate Software Limited
Date From : Date To : Sort By 1. :		01-Jan-15 31-Dec-15 Date			
Doc No.	Doc Date	Туре	Client Code	Amount Receipt No. Allocated	Receipt Date
1	01-Jan-15	Fees Journal	GAT01	50.00 LD159	29-Jul-15
1	01-Jan-15	Fees Journal	GAT01	50.00 LD160	29-Aug-15
1	01-Jan-15	Fees Journal	GAT01	5.75 LD161	29-Sep-15
INV002	13-Feb-15	Bill	BUI01	6,000.00 LD1	27-Feb-15
INV003	24-Feb-15	Bill	BZG01	700.00 LD180	16-Mar-15
INV006	19-Mar-15	Bill	EA01	500.00 LD17	23-Mar-15
INV007	19-Mar-15	Bill	EA02	500.00 LD17	23-Mar-15
INV008	24-Mar-15	Bill	EB01	1,000.00 LD18	13-Apr-15
INV009	26-Mar-15	Bill	WW01	1,410.00 LD18	13-Apr-15
INV011	31-Mar-15	Bill	WP01	470.00 LD19	06-May-15
INV013	01-Apr-15	Bill	W001	528.75 LD20	14-May-15
INV001	29-Dec-15	Bill	GAT01	1,500.00 LD1	27-Feb-15
INV001	29-Dec-15	Bill	GAT01	44.25 LD161	29-Sep-15
INV001	29-Dec-15	Bill	GAT01	50.00 LD162	29-Oct-15
INV001	29-Dec-15	Bill	GAT01	50.00 LD163	29-Nov-15
INV001	29-Dec-15	Bill	GAT01	50.00 LD164	29-Dec-15
		Grand Te	otal	12,908.75	

OUTLAY REPORT

We have introduced a new report called 'Outlay Report'. To access the Outlay Report, select Reports » Client Reports » Outlay Reports. The outlay report will show the outlay expenses allocated against bills / credit notes which are already set under 'Direct Expense Control' and 'Indirect Expense Control' in Settings > Nominal.

Outlay Report Report							Relate Software Limited		
Date From :		01-Jan-15							
Date To :		31-Dec-15							
Sort By 1.:		Date							
Doc No.	Ref. No.	Туре	Date	Debit	Credit Client Code	Expense Ref. No.	Expense Date	Amount Batch No.	Created By
PI003	3	Purchase Invoice	13-Feb-15		39.95 BK01	3	13-Feb-15	34.00 Linked Outlay Batch No. 9	LIP
123458	10101012	Payment	13-Feb-15		41.13 BK01	10101012	13-Feb-15	16.00 Linked Outlay Batch No. 10	LIP
123458	10101012	Payment	13-Feb-15		41.13 BK01	10101012	13-Feb-15	19.00 Linked Outlay Batch No. 10	LIP
								69.00	

MY COMMUNICATIONS

EMAIL

We have made a number of improvements as well as adding additional functionality to the Email module within DRIVE.

EMAIL FOOTER

We have added a new 'Footer' option within DRIVE Communications options under E-Mail. This will allow you to set an individual footer as well as a global footer that can be applied to all emails.

Ommunication Settings (Laurence J Pyzer)	×
Account Signature Options IP Phone Footer	
Use Individual Footer	
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Times New Roman V 3 (12pt) V B I U	Ŧ
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Use Gobal Footer	
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Times New Roman V 3 (12pt) V B I U	=
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	~
OK Cancel	
<u>or</u> <u>o</u> urce	

The 'Footer' has been classified into two categories.

<u>» Use Individual Footer:</u> Select the tick box to display the individual footer. The individual footer varies depending on the staff member logged in. This is variable and can be customised for each staff member

<u>» Use Global Footer</u>: Select the tick box to display the global footer. The global footer is constant irrespective of the staff members log in.



SPELL CHECKER

We have enhanced the spell checker option in email communication section. Now spell checker will work on the email excluding the original part of the mail when forwarded or replied.

E-MAIL PARAGRAPHS

We have introduced a facility to add a paragraph in Communications. To set up communication paragraphs, select Tools-> Templates-> Communication Paragraph.

DRIVE (Version 2.1)									_		×
<u>F</u> ile <u>V</u> iew <u>P</u> ostings <u>A</u> ccoun	ts <u>M</u> arketi	ng <u>R</u> eports <mark>I</mark>	<mark>ools</mark> Th <u>e</u> me <u>H</u> elp	345							
DAAAA			Lookups	240						ients 🔻	
			Staff Access Rights								
DRIVE Desktop	Client	& Contact	User <u>A</u> ccess Groups								
My Diary	Find		Bill/Credit <u>N</u> ote Paragraph			Find	-				
My Tasks			Templates		Bill Template						
() Time Manager		Search All F	Workflow / Deadline		Credit Note Te	emplate					_
Timesheets	Code		Synchronise with Outlook	-	Balance Sheet	Template		Туре	Туре	Country	
Expenses	ANT01	Antiques (Uni	Synchronise with Outlook	_ <		C T		/ Limit	Client	United Kingd	
	BUI01	Batch Builders	Recurring		Profit and Los	s Statement Tem	plate	/ Limit	Client	United Kingd	
Client & Contact Database	BZG01	Braintree Zoo	Proforma VAT Journal Creation		E-Mail <u>T</u> empla	late te		Y Limit	Client	United Kingd	•
🥔 Jobs	BK01	Burnells Book	Validation Check	-	SMS Template			Y Limit	Client	United Kingd	
1 Staff	TRT01	Charitable Tru			Communicati				Client	United Kingd	
Staff Heliday A says	DNC01	Dot Net Cons	Control Check Report		Communicati	on Paragraph		der	Client	Ireland	
a starr Holiday/Leave	SM01	Dr M Simmons	Recalc <u>u</u> lation	• d •		04905 653498	Sole Tra	der	Client	United Kingd	• _
Job Plans	EST01	Eastman's Est	Vear-End	nd Es	state	020 82347654	Partners	ship	Client	United Kingd	
Reports	EB01	Essex Bricks (ау		03456 345672	Compan	ıy Limit	Client	United Kingd	•
Accounts	FLT01	Flats Limited	Registration	Cent	tre	020 87230765	Compan	ıy Limit	Client	United Kingd	•
Accounts	GAT01	Gatsby Antiqu	Communication Toolbar F6	use	Citywest Busine	020 76545678	Compan	ıy Limit	Client	Ireland	
V Alerts	GJ01	Guildford Jew	Default Communication Folders	et		06986 673451	Compan	ıy Limit	Client	United Kingd	
🥔 Books In	HFA01	Harlow Financ		đ		05076 439765	Compan	y Limit	Client	United Kingd	•
	KI01 Keg Inns Limit Lock/Unlock Grid Settings	LOCK/Unlock Grid Settings) Bar	rel Street	020 76340912	Compan	y Limit	Client	United Kingd		
	LLP01	Large Structu	Customize Toolbars	r		020 86739401	Limited L	Liability	Client	United Kingd	
	LD01	Leon Driving]	Dashboard Settings			06456 873452	Sole Tra	ider	Client	United Kingd	•

Paragraph option appears in Communication window.

Description	Add
	Edit
	Delete

To add a new paragraph, select the Add button. The Communication Paragraph window will be displayed and you can create and save the paragraph. Multiple Paragraphs can be saved and added.



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O Communication Paragraph	8 <u>—</u> 8	×
Save & Close		
Description Welcome Email (DRIVE)		
i μ 🗈 🖄 2 🤊 (* 🔳 📓 — Ω 😫 🐘 🕼 🛍		
Anial → 2(10pt) → B I U abe = = = = x [*] x ₂ Ξ Ξ 葉 (10pt) → Δ ·		
relate welcome to software RELATE ACCOUNTS PRODUCTION		^
Hi , Hope you have been keeping well. Further to your recent order, as support manager I would like to welcome you onboard. I have copied in the information below that will be needed at the start of the implementation. Please find attached the DRIVE Implementation Guide.		~

Once the paragraphs have been added you can then use them by selecting the Paragraph button from within the DRIVE email window.

New E-Mail Message	je		5		×
Send 💾 Sav	e & Close 🚆 🔓 SMS 🦾 👼 Generate Timesheet Signature - 🥢 🏘	Paragraph	Notes	<u>C</u> ampaign	Ŧ
Show All Folders Expand All Folders Expand All Folders Sales Sales Sales DRIVE Compare PTax Mail Shir Outstar Surfaccoun	From dwayne.morgan@relate-software.com Dwayne Morgan Job Contact Subject Image: Anial Image: Anial <td>riority riority <u>vpe</u> <u>tatws</u> ompleted on <u>ncident No.</u></td> <td>Normal</td> <td>Send to Histor</td> <td>· · · · · · · · · · · · · · · · · · ·</td>	riority riority <u>vpe</u> <u>tatws</u> ompleted on <u>ncident No.</u>	Normal	Send to Histor	· · · · · · · · · · · · · · · · · · ·
	www.relate-software.com http://twitter.com/RelateSoftware Surf Accounts is the fastest growing cloud accounting package for small business	customers	in Ireland.		~

D

DRIVE DESKTOP

TIMESHEETS

Performance: The overall performance of the timesheets has been improved when it comes to posting and saving timesheet records.

Timesheet Monitoring: We have increased the maximum tolerance to 45 hours.

Generate Timesheet: We have removed unnecessary fields.

JOBS BROWSE

Job Browse: We have added a filter for 'Office' in the job.

CLIENT & CONTACT BROWSE

Client Fees Ledger: We have added a new column in the client fees ledger called 'Original Date'. When a proforma bill is converted to a standard bill, in client fees ledger card the proforma bill date will appear under the new column 'Original Date'.

New Entity and Contact Types added: We have added the following entity types to DRIVE and associated contact types. These will be available as defaults.

Entity Type: School Associated Contact Types are

- School-Chairman
- School-Secretary
- School-Trustee
- School-Parent Nominee

Entity Type: Club

Associated Contact Types are

- Club-Chairman
- Club-Secretary
- Club-Treasurer
- Club-Trustee

Entity Type: Charity

Associated Contact Types are

- Charity-Director
- Charity-Trustee
- Charity-Patron
- Company Secretary





BOOKS IN

In Books In, the 'Received By' and 'Staff' look up and drop down will show all the staff members

COMPANY SECRETARY INTEGRATION

The Company Secretary Integration has been improved. Two new tick boxes have been added in the Company Secretary link as 'Update Business Address' and 'Update Registered Address.'

For Client records the following fields will be updated.

»Company Name
» File As
»Business address (Including New Post Code)
» Regd. Office address (Including New Post Code)
» Phone 1
» Phone 2
» Mobile
» Fax
» Fax
» E-mail
» Web
»Year End Date
»Annual Return Date
»Company Status

For Contact (Directors, Secretaries and Shareholders) records the following fields will be exchanged.

» Name

» Address (Including New Post Code)
» Phone 1
» Mobile
» Fax
» E-mail
» Web

»Contact Type

Please note, the values of the above fields for the clients are only updated if they differ from what is in Drive.



FEES LEDGER

UPDATED BILLING E-MAIL OPTION

We have added an option to include Client Name & Bill No in E-Mail Subject from Print Bill window.

Print Bill	X
- 🚔	
Template	Relate Bill Template
Use Office Address	
Office Address	
Client Address	Business Address
Date Format	d/MM/yyyy
Number Format	123,456.00
Use Client Currency	
Print Bill	
🔘 Update Bill	
🔘 Re-generate Docur	ment
Include Client Na	ame & Bill No. in E-Mail Subject
Include Bill Back	ing Report in E-Mail
<u>E</u> -Mail	Preview Print Cancel

The detail will then be displayed with the Subject Field on the email.

Send	블 Save & Close 블 🚦 SMS 🔔 👼 Generate Timesheet Signature 🗸 🥢 F	Paragraph Notes	Campaign 🔛
rom	• 09/04/2014 14:54	Priority	Normal *
<u>o</u>		Type	
<u>c</u>		<u>Status</u>	
ssign To	Request Read Receipt	completed on	
lient	Master Company [000C]		() Client
<u>ob</u>	ABE4 Audit *		Contact Prospect
ontact			Supplier
ampaign	▼ Stage ▼	Interests	Asset Register
alue	0.00 Weighting -		Business Development Se
ubject	Master Company - Bill No. bill 1		Send to History

LODGMENTS

UNALLOCATED COLUMN

A new column 'unallocated' has been introduced in Receipt browse. This is available from the Column Chooser window. Once the column is selected from column chooser, the receipt browse will show unallocated amount for each receipt.

LODGEMENT DATE ALERT

We have added an alert when creating a lodgement to inform the user when the receipt date posted is after the date of the lodgement. When the receipt date is after the lodgement date this can cause the Bank Reconciliation to be out.



PURCHASE LEDGER

PAY SUPPLIERS

We have introduced a new option under Purchase Invoices for "Pay Suppliers". This is used to generate a SEPA file to pay your creditors. DRIVE generates an external file which can then be uploaded to your bank.



DATA MINING

NEW FIELDS

Turnover: The Turnover field is now available under the field selection when the source of information is set to Clients Only.

Job Type: The Job Type field is now available under the field selection when the source of information is set to Job Only

PAYE\PRSI: The PAYE\PRSI fields are now available under the field selection when the source of information is set to Client Only

File As: The File As field is now available under the field selection when the source of information is set to Clients Only.

E-MAIL TEMPLATE

We have added a new functionality to the Email Template used within Data Mining. If a merge field is inserted into the body of the e-mail, the 'Send Individual E-Mails' option will be ticked by default and greyed out.

We have also added a merge field 'Signature Title', which will pull the information from Title (Staff Details) for the Staff member selected in the Signature dropdown in a mail merge.

DOCUMENT MANAGEMENT

ADD SUBJECT TO FILE NAME

Under the Scanned Document settings we have now introduced an option to 'Add Subject to the File Name'.

bocument Manage	ement		
Setup			
General Client	Contact Supp	lier	
Inbox Folder	C:\RelateSoftw	are\Demo_DRIVE\DocumentMana	igement\Inbox
Use Folder Structur	re as Filename		
Add Subject to File	Name		
	1		
Show Preview Pane			
Show Preview Pane Show Scanned Doc	ument Alert		

When browsing the scanned documents files externally you will now be able to see the Subject name.



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WORKFLOW

There have been a number of additions to the Workflow module as well as an overall improvement to the performance.

STAFF ASSOCIATION

Staff included in an existing workflow can now be removed from the workflow completely and from all stages by deselecting the staff member from the main selection. However, if a particular staff member is the only staff member for one or more stages, they cannot be deselected from the workflow.

STAGE BUDGET

The Stage budget amount will now change according to the Planned Start & Finish date range. A confirmation message box will appear first and by selecting the "Yes" a recalculation will be carried out. If you select "No" the budget amount will remain as it was.

Budget calculation formula:

- 1) Budget of each Stage = Total Charge-out Rate * Number of Days
- 2) Total Budget = Sum of all Stage Budgets

PROSPECTS

You can now create a workflow for a prospect within DRIVE. The "Allow Posting of WIP to Prospects must be enabled within the Settings (Tools > Settings > WIP Ledger Setup). The prospects will then be visible within the Client list when creating a new workflow.



MAIL MERGE

SUBJECT FIELD

The Select Mail Merge Document Window now includes an additional field called Subject.

Descr	iption	Category	Add
64-8 Cover Letter		Standard Letters	
Accounting for Antiques		Invitations to Seminars	Edit
Annual Return for Signature		Standard Letters	Delete
Appointment of Director - Selected	Director	Standard Letters	
Bank Acknowledgement of Audit Re	equest	Standard Letters	Design
Bank Audit Letter - Selected Bank		Standard Letters	
Bank Authorisation Letter - Selecte	d Bank	Standard Letters	
Blank Letter - All Contacts of Client	s etc. Mining	Blank Letters	
Blank Letter - Clients, Prospects &	Contacts	Blank Letters	
Blank Letter - Individuals		Blank Letters	
Blank Letter - Selected Contact of Client etc.		Blank Letters	
Blank Letter - Staff		Blank Letters	
Budget - All Contacts of Clients etc. Mining		Budget Covering Letters	
Budget - Clients, Prospects & Contacts		Budget Covering Letters	
Budget - Individuals		Budget Covering Letters	-
Select Signatory Others		-	
Signature Laurence J Pyze	er	*	
Select Contact		*	
Subject		ОК	Cancel

The subject entered in the field will be auto populated on the Update Communication dialogue box and will be in read-only mode as a merged field.



TEMPLATES

EMAIL TEMPLATE

We have enhanced the 'Email Template' under the 'Tools' option. This is applicable to the following template types.

» Bill » Statements » Remittance Slips

An 'Insert Merge Field' button will appear on the toolbar for the above templates mentioned. The button will be displayed once the cursor is on the 'Subject 'line or on 'Body Text' as shown below;

E-Mail Merge Template		x
Save & Close	Insert Merge Field	
Description	Template Type Bill	-
Priority Normal	<u>Status</u>	
	Completed on 👻 👻	
<u>Campaign</u>	Stage Interests Asset Register	
	Weighting Business Development S	Servi 👻
Subject Click here to enable		
X B B 2 9 @ B 🖉 -	- 52 😒 🐘 🗛 the 🔟	
Times New Roman 👻 3 (1	20t) ▼ B I ∐ abe ☰ ☰ ☰ X' X, 三 三 谭 谭 💆 • 🛓 •	
Click here to enable		^
8	Supported Template Types: Bill / Statements / Remittance Slips	
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BALANCE SHEET REPORT AND P&L STATEMENT

Drive has now introduced the facility to design and save multiple Balance Sheet and Profit & Loss templates. To avail of the option, select **Tools>> Templates>> Balance Sheet Templates** (or **Profit & Loss Statement Template**).

For full details please refer to the Financial Reports guide available to download from the support section of our website (DRIVE > Documentation > Practice Management > Financial Report Setup).

MISCELLANOUS

TOOLS

ACCESS RIGHTS

Draft Billing: We have introduced access rights for draft billing in the Fees Ledger section. You can edit a signed off bill if you have the correct access. The rights will be hierarchical, that means users having access right to sign off a bill will automatically have access to edit and review bills even if the user doesn't select the option.

Books In: We have introduced a Make Complete option under the Other section for Books In. By default, this check box will be ticked. The user will only be able to 'Make Complete' the Books In provided the access right has been enabled; if the user does not have access an alert message will pop up prompting insufficient access rights.

Document Management: We have introduced an access right for the 'Settings' under the Scanned Documents section. This will give users access to edit the Scanned Documents settings.

RECEIPT TRANSFER

We have enhanced the 'Receipt Transfer' option to allow you to transfer a receipt from a closed job to active job.

Please note, in case of spilt job this functionality is not applicable.

DRIVE UPDATE ALERT

There is now an automatic DRIVE Update Alert within DRIVE. It will check the version installed on the users machine and compare with the latest version available on release. If the version is older than the released version, then a message will prompt to inform the user there is an update available to download.

Please Note: It will not automatically update your DRIVE for you.

