RELEASE NOTES for DRIVE



Version 3.3 Build 2



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INTRODUCTION

These release notes outline the enhancements introduced in DRIVE Version 3.3.2.

Please take the time to read the notes and then apply the update.

If you have any queries, please contact support at support@relate-software.com or call

+353 1 4597800 ROI or +44 871 284 3446 (UK).

The following changes have been requested from both user feedback and internal quality control reviews. If you have any further changes you would like to request in DRIVE CRM & Practice Management, please send an email to <u>enhancements@relate-software.com</u>.

IMPORTANT

Back up your database before running the update. Relate Software recommend that you take regular backups of your database to minimise any loss of data.



MY COMMUNICATION/EMAIL

OPTIONAL MODERN OAUTH EMAIL AUTHENTICATION

DRIVE has historically used Basic Authentication for retrieving emails, meaning it has stored the password for the email account in its database. In this release, you will now be able to choose to use modern OAuth Authentication (meaning you will be redirected to the application, to give approval, without needing to give away your password).

To turn on OAuth Authentication, go to [**My Communications**], [**E-Mail**], [**Communication Settings**].

In the **E-Mail Settings** window, select the **Use OAuth Authentication** checkbox and click **Connect**. You will be redirected to the OAuth 2.0 based authentication process of the application you use e.g., Microsoft.

E-Mail Settings		×
- 🚅		
Account Name	Laurence JPyzer	Default
E-MailAddress	@relate-software.co.uk	
Server Information	Use OAuth Authentication Connect	

Figure: the 'Use OAuth Authentication' checkbox

Once there, then enter your Microsoft Login details (email and password) to proceed.

Microsoft		
Sign in		
Email, phone, or Skype		
No account? Create one!		
Can't access your account?		
	Back	Next
Sign-in options		

Figure: The Microsoft Login Form



CLIENT DETAILS

BOOKS IN TAB

We have added a **Books In** tab (between **Fees Ledger** and **Job Plans**) in the **Client Details** window. This will also still be available from the Client & Contact browse.

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Figure: Books In tab in Client Details

DEADLINES TAB

We have added a **Deadlines** tab (between **Book In** and **Job Plans**) in the **Client Details** window. This will also still be available from the Client & Contact browse.

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Save	re & Close			Q 🔶 ,								
General	Practice	Other Information	Jobs	Recurring Jobs	Communications	Contacts	WIP Ledger	Fees Ledger	Books In	Deadlines	Job Plans	Links
DATE		DEADLINE		DUE	STATUS	COMPLETED	DURATIO	N STAFF		NC	OTES	

Figure: Deadlines Tab in Client Details



TRANSACTIONS PRIOR TO PERIOD START DATE

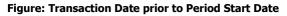
WARNING MESSAGE

We have introduced a validation when entering transactions, if you enter a date prior to the period start date, you will receive a warning message. This will not stop you from using this date.

Note: You can check the current Period Start Date from [Tools], [Period Dates].

For Example, navigate to [**Fees Ledger**], [**Bills**], add or edit a bill. If you enter a transaction date prior to the Period Start Date and click **Save**, a warning message is displayed.

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Figure: Warning Message





DEADLINE MANAGEMENT

CLIENT DEADLINE BROWSE ADDED

We have introduced a **Client Deadlines** browse in the **Deadline Management** module. A full list of all client deadlines will be displayed, from which you can filter, for example by status or deadline type.

To navigate to it, click [Deadline Management] and select [Client Deadlines].

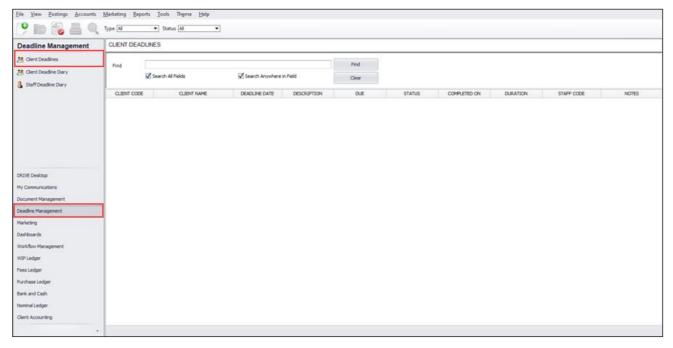


Figure: Client Deadlines Browse



WEB LINKS IN EMAILS

USERS DEFAULT BROWSER WILL NOW BE USED

In this release your system's default web browser will be used to open any web links found in emails. For example, if Mozilla Firefox is set as your default browser, then that is the application that will open when you click on a web link from an email.



INTEGRATION WITH ACCOUNTANCY MANAGER

EXPORT CLIENTS & SERVICES TO 'ACCOUNTANCY MANAGER' IMPORT TEMPLATE

We have introduced a new export of Client and Services details to an excel format consistent with the format required to import into Accountancy Manager.

To access this export, go to [Tools], select [Export Clients and Services to Accountancy Manager].

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	Control Check Report	
	Recalculation	
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	Communication Toolbar	F6
	Default Communication Folders	ru
	Lock/Unlock Grid Settings	
	Customize Toolbars	
	Dashboard Settings	
	Multi-Currency Setup	
	Period Dates	
	Transfer WIP	
	Transfer Receipts	
	Alert Manager Settings	
	Settings	
	Change Database	
	Archive Documents	
	Generate Bank CSV File	
	Interest Calculation	
	GDPR	
	Support Staff	
į.	Export Clients and Services to Accountance	y Manager
	Export WIP to Accountancy Manager	
	Export WIP to NetSuite Migration	

Figure: Tools - Export Clients and Services to Accountancy Manager

Click [OK] to begin the export.



Figure: Clients and Services Data Export Begins

A progress bar will then be displayed.



Figure: Data Export in Progress



The exported data will then open in excel. The column order will be as required to import straight into Accountancy Manager.

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			Guharay Associates	Guharay Associates		Irish Company Limi	ted By Shares						
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Figure: Data Exported in Excel Format

EXPORT WIP TO 'ACCOUNTANCY MANAGER' IMPORT TEMPLATE

We have introduced a new export of WIP data to an excel format consistent with the format required to import into Accountancy Manager.

To access this export, go to [Tools], select [Export WIP to Accountancy Manager].

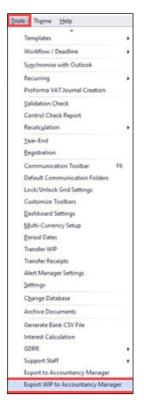


Figure: Tools - Export WIP to Accountancy Manager



Click [**OK**] to begin the export.

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Figure: WIP Export begins

A progress bar will then be displayed.

Export WIP To Accountancy Manager		×
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Figure: WIP Export in progress

The exported data will then open in excel. The column order will be as required to import straight into Accountancy Manager.

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ML	Bruhan Motors			c	lare Rimmer	08/01/20	16			€60.00	360	€360.00 Au	dit			
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0001MD	Alpha Solutions Ltd.			0	lare Rimmer	01/01/20	18			€18.00	480	€144.00 Au	dit			
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Figure: Data Exported in Excel Format

