# RELEASE NOTES for DRIVE



Version 3.4



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# INTRODUCTION

These release notes outline the enhancements introduced in DRIVE Version 3.4.

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

If you have any queries, please contact support at <a href="mailto:support@relate-software.com">support@relate-software.com</a> 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.



# FEES LEDGER - CHECK FOR DUPLICATE LODGEMENT NUMBER

We have introduced, when adding new lodgements, a check for the existence of the **Lodgement number**. If it finds the lodgement number it will display a warning message, 'This Lodgment Number already exists', at which point you should go back and enter a 'unique' lodgement number. Duplicate lodgement numbers will cause issues in Bank Reconciliations.

You can view the existing list of Lodgment numbers from [Fees Ledger], [Lodgement].



Figure: Duplicate Lodgement Number





# CONNECT TO MY MICROSOFT 365 ACCOUNT

We have introduced modern OAuth connection process for Incoming and Outgoing mails using Microsoft Office 365.

To set it up, navigate to [**My Communications**], [E-Mail], [Communication Settings], select an account and click **Edit**.

In the **Email Settings** window, select **M365** as the server (from the dropdown) for Incoming and/or Outgoing mails.

Select the **Use OAuth Authentication** checkbox and click **Connect** to establish the server connection. You will be redirected to the OAuth 2.0 based authentication process of the application you use, for example, Microsoft.

E-MAIL	L (INBOX)			0				1
Staff	Laurence JPyzer	[L]P]		e E-Mail Settings			×	
1	1 🎿	<b>1</b>	0	- 22				
1		1000		Account Name	Tect			
Inbo	K Qutbax	Sent Items	Draft	Account Home	1650		M Default	
	DATE			E-MailAddress	jayanta.guharay@relate-infoteo	h.com		SUBJECT
1	16-11-2022 14:56	jay	antaguhara		Use OAuth Authentication	Connect		
1	16-11-2022 14:55	jay	entaguharay	- Server Information				
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1000	16-11-2022 14:42	abh	ik.mukherje	Incoming Mail Server		Port	143	
0 1	14-11-2022 22:20	nor	eply@emea	This server requires a secure of	onnection (SSL)			
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0	11-11-2022 16:18	nor	eply@emea	Outgoing Mail Server	mail.surfaccounts.in	Port	587	
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0	08-11-2022 11:05	nor	epiy@relate	Password	********			
0	08-11-2022 11:05	nor	eply@relate					
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			0.0000000	ceave copy on server	LI	QK	Gancel	and a second sec

Figure: Separate OAuth Connection in Email Settings

If you have an account with a provider like 'SendGrid', enabling more reliable email delivery, for your outgoing mails then you can enter those details here also.

To use **SendGrid** as your outgoing mail server, select 'SMTP' as your **Type** and enter 'smpt.sendgrid.net' as the Outgoing Mail Server **Name**, and '587' as the Outgoing Mail Server **Port**.

The Outgoing Mail Server '**User Name** '= APIKey and '**Password**' = Your API Key provided by SendGrid.

5



#### ACCESS RIGHTS FOR THE ACCOUNTANCY MANAGER EXPORTS

We have introduced new access rights for the two Accountancy Manager exports to excel. These are restricted by default.

You can enable these rights from [**Tools**], [**User Access Rights**], select to [**Edit**] the appropriate group, then from [**Access Functions**], [**Other**], tick the checkbox to enable access to `**Export Clients and Services to Accountancy Manager**' and/or `**Export WIP to Accountancy Manager**'.

cress Group	Manager				Columbati	and and
Access Group	manager				Select Al	Unselect All
<ul> <li>Data Selection</li> <li>Clients</li> <li>Jobs</li> <li>Staff</li> <li>Communica</li> <li>Scanned D</li> <li>Events/Tai</li> </ul>	ations locuments sks./Meetings	Job Plan Access Edit New Delete Bil/Credit Note Template Access Edit	Campaign           Image: Campaign <tr< td=""><td>Books In Access New Make Con</td><td>Delete</td><td></td></tr<>	Books In Access New Make Con	Delete	
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<ul> <li>Lookups</li> <li>GDPR</li> <li>VAT.Betra</li> </ul>	a				OK	Cancel

**Figure: Edit Access Group** 





# ACCOUNTANCY MANAGER EXPORTS TO EXCEL

We have introduced new exports to excel, to match the required import templates to import into Accountancy Manager.

To access these exports, go to [Tools], you will see two exports 'Export Clients and Services to Accountancy Manager' and 'Export WIP to Accountancy Manager'.

Templates	
Workflow / Dearline	
Sunchannise with Outlank	
Bassing and Samer	
Recurring Budarma VAT Investigation	
Protoma val Journal Creation	
Validation Check	
Control Check Report	
Recalcylation	
Year-End	
Begistration	
Communication Toolbar	F6
Default Communication Folders	
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	
Export Clients and Services to Acco	ountancy Manager
Export WIP to Accountancy Manag	ger
Export WIP to NetSuite Migration	

Figure: Tools - Export Clients and Services to Accountancy Manager

On selecting the **`Export Clients and Services to Accountancy Manager**' export, you will be prompted to select the appropriate country (IE or UK), as Accountancy Manager has different import templates for the different jurisdictions. Then click **[OK]** to begin the export.

Country	IE	-

Figure: Clients and Services Data Export Begins

A progress bar will then be displayed.

Country	Œ	٣	

Figure: Data Export in Progress



The exported data will then open in excel. The excel will be colour coded and the data will be prepopulated into the appropriate columns.

1	STAFF & PA	RTNER USERS	2	BI	USINESS DETAILS			ACCOUNTING SYSTEM		COMPANY DE	TAILS (IF APPLICABLE	)	Revenue.ie	
2	Staff User Responsible* (Full Name)	Partner (Full Name)	Client Name*	Trading As	Nature of Business	Client Type* (Irish Limited Company, Irish SA, Irish Partnership, Irish Other)	Date of Trading	Accounts Production Software	Company No*	Company Tax Reference	Company Authorisation Code	Revenue.ie Year End (Date)	CT Online (Y/N)	Con First I
3	Stuart Bailey	Clare Rimmer	Bruhan Motors	Bruhan Motors		Irish Self Assessment			1			31/12		
4			Dola Ghosh			Irish Self Assessment								Hindo
5	Susan Edwards		NIIT Technologies Limited			Irish Self Assessment								
6	Jayanta Guhari	Laurence JPyzer	Alpha Solutions Ltd.		Accountant	Irish Private Limited Com	pany		CN123	CTR123				Monib
7	Clare Rimmer	Laurence JPyzer	McMahon Associates			Irish Partnership								
8	Stuart Bailey	Richie M McMal	Somani Suppliers Ltd.			Irish Private Limited Com	pany		1					1
9	Susan Edwards		McNally Motors Ltd.			Irish Private Limited Com	pany							
10	Stuart Bailey	Clare Rimmer	ABB Research Centre		Hospital Trust	Irish Private Limited Company							1.1.1	Autom
11	Susan Edwards	Richie M McMai	ABC Corporation Limited			Irish Private Limited Com	pany							Jayant
12	Jayanta Guhara	Raymond Roger	Bajaj Industries Limited		Zoological Gardens	Irish Other			TTK	ERY				United
13	Jayanta Guhara	iγ	Child Client-1			Irish Private Limited Com	pany			1000 C			· · · · · · · · · · · · · · · · · · ·	
14	Clare Rimmer		Child Client-2			Irish Private Limited Com	pany							
15	Jayanta Guhara	iy .	COSEC Client Limited			Irish Private Limited Com	pany		A					1
16	Stuart Bailey	Richie M McMal	East India Company			Irish Other								
17	Stuart Bailey	Richie M McMal	Hexagon Engineeering Limit	ed	Architect	Irish Private Limited Com	pany		CN4589	CT7745			1	Hindol
18	Susan Edwards		Jayanta Etd.			Irish Other								
19	Susan Edwards	Clare Rimmer	Jupitar Cooling Towers			Irish Private Limited Com	pany							-
20			Jigma Motors Limited			Irish Private Limited Com	pany							-
21	Jayanta Guhara	iy.	Jupitar Trading Company			Irish Private Limited Com	pany							
22	Susan Edwards	2	Jupitar Tours & Transport		1	Irish Private Limited Com	pany		1					1
23	Clare Rimmer		L & T Infotech		Accountant	Irish Private Limited Com	pany							
34	AM	Import	AACTONIAL TO CLEANIANC CED	UNCER LILLATED		Islah Britanta I lasked Com	A. A. AL		1447063					

#### Figure: Data Exported in Excel Format

You can update any other fields contained in the excel, prior to importing into Accountancy Manager.

You should then save the file and open Accountancy Manager to import.





# AUTO EXTEND THE PRACTICE END DATE

We have introduced a new option in [**Tools**], [**Period Dates**] which if you select will extend your yearend automatically.

When you hover over the checkbox, you will see the following message 'If selected, 6 months after the Practice End Date, the system will automatically update the Practice End Date by another 6 months.'

Practice Start	Date 01-01-2022 -	Practice E	End Date 31-1	2-2022 🔻
No. of Period	s 12 Gen	erate Lock all p	revious years	V
Auto Extend	Practice End Date 😨			
PERIOD NO.	DESCRIPTION	FROM DATE	TO DATE	LOCKED
1	January 2022	01-01-22 🔻	31-01-22 💌	
2	February 2022	01-02-22	28-02-22	
3	March 2022	01-03-22	31-03-22	
4	April 2022	01-04-22	30-04-22	
5	May 2022	01-05-22	31-05-22	
6	June 2022	01-06-22	30-06-22	
7	July 2022	01-07-22	31-07-22	
8	August 2022	01-08-22	31-08-22	
9	September 2022	01-09-22	30-09-22	
10	October 2022	01-10-22	31-10-22	
11	November 2022	01-11-22	30-11-22	
40	D 1 0000	04 40 00		1000

Figure: Auto Extend Practice End Date Checkbox

The Practice End date will automatically get extended for six months and the change will be applicable once you re-login the application through a confirmation message.

DRIVE (Version 3.4)			×
<mark>b</mark> Bright	User ID Password	ljp •	
<u>Change Database</u>		ОК	Cancel
Information			×
Practice End Da	ate has been	extended to 30-06	-2023
			ок

Figure: Practice End Date Confirmation Message





# **CLIENT LINKS**

We have introduced a new 'Effective To' field for linked clients, to effectively allow you to 'End' the link.

To End a Link, go to the [Links] tab of the Client Details window.

If a 'Lined for Billing' 'Effective To' date is set, the client will no longer be linked for billing purposes and will not appear on the list of clients/jobs on future bills.

**Note:** Bills generated prior to the 'Effective To' date will remain valid/unchanged.

🕒 Edit Client Details - Bruhan Motors X													
🔜 Save & Close 🤷 🦻 🔂 🔍 🛧 🔶 🧾													
General Practice Per	ersonal Other Information J	obs Recurring Jobs	Communications	Contacts	WIP Ledger	Fees Ledger	Job Plans	Deadline	Links				
CODE		NAME				LINK TYPE			EFFECTIVE	E TO			
AAA14 Md	IcNally Motors Ltd.			L	inked for Billing			2	6-09-2022	2			
		Linked Client of     Second Seco	Bruhan Motors AAA14 McNally Mo Linked for Billing 26/09/2022	itors Ltd.	× •								

Figure: Set 'Effective To' Date for Linked Client Billing



# **STAFF RATES IMPORT**

We have introduced new functionality in the Staff Rates Import routine, where if the 'Rates To' field is left blank, it will be automatically set to the 'Rates From' day - 1 of the previous Rates.

Edit a staff : Laurence JPyze	er.									×		
	<u>2</u> 1	₽										
General <sup>1</sup> <sup>V</sup> Personal Other Information Communications Contacts Diary Tasks Time Expenses Documentation Accounts												
* Staff Code	LJP		Send E-Mai	ils	Accountabl	e Units			40.00			
* <u>Name</u>	Laurence JPyz	er			Budget Bas	ed on U	Inits/%	Units	-			
Office	London	Edit S	taff Rates			_			70.00			
Department									-1.00			
* Type	Edit Staff Gra	Ra	tes From			01-01-	-2018 -		×			
Partner (	GradeDescrip	Ra	ites To			31/12/	/2019 -		N	RATE		
Manager	START DATE	Ch	arge-Out Rat	e	Cost Rate	[	Description	Add		25.00		
* <u>Grade</u> 01-0	1-2018	1.	25.00	*	15.00	Standa	ard	Edit		35.00		
Title 01-0	1-2020	2.	0.00	Ì	0.00							
Access Group		3.	0.00	Ì	0.00			Delete				
* Password/Confirm Passv		4.	0.00		0.00							
* <u>Status</u>		5.	0.00		0.00							
Date of Joining		6.	0.00		0.00							
Date of Leaving		7.	0.00		0.00				dit	Delete		
Holiday Entitlement		8.	0.00		0.00							
TOIL Carried Forward		9.	0.00		0.00							
Study Leave Entitlement		Mileage	•		0.00				ing	·		
Exam Leave Entitlement		Transfe	r Rate		15.00					·		
Public Holiday Entitleme									.:)			
Chargeable WIP Analysis						ОК	Cancel					
Non-Chargeable WIP Analysis				۲	Draft Bill	Approv	al Level		Ŧ			
Cost Centre	PART Partne	rship		*	Approve	Other St	taff Bills					
Default Communication Type				*	Receive	Quote Al	lerts					
Default Job Code				Ŧ	Change / Change /	AML Deta Engagen	alls nent Letter Details	V				
System Administrator	Show	Last 10	Clients		Change (	Quote Le	tter Details					

Figure: Automatically Update 'Rates To' Field



D