RELEASE NOTES

for DRIVE

Version 3.0 Build 24

relate software

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INTRODUCTION

This document outlines the enhancements introduced in **DRIVE Version 3.0.** The main changes have been the addition of four new modules, Budgeting, Credit Control, Alert Manager and GDPR as well as greatly improved Outlook Integration.

Please take time to read the notes and 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 program changes have been requested from both user feedback and internal quality control reviews. If you have any further changes you would like to see in DRIVE CRM & Practice Management, please send an email to enhancements@relate-software.com

IMPORTANT

Backup your database before running the update.

Relate Software recommend that you take regular backups of your database

to minimise any loss of data.

BUDGETS

INTRODUCTION

We have introduced the facility to enter in Yearly and Periodic Budgets for Fees, WIP and Cash. These Budgets can be entered in Summary or Detailed format and can be broken down at a Partner, Manager and Staff Level and further Analysed by Client or Job (there are also options for analysing budgets at a Department and Office Level).

CREATING A BUDGET

To access the budgeting module select 'Budget' from the DRIVE Desktop menu.

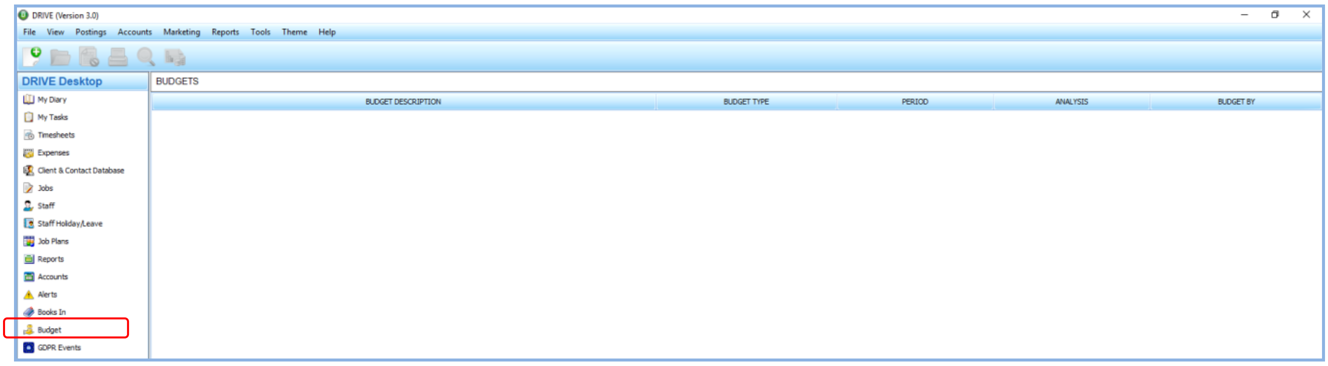


Figure 1 Budgets

After accessing the new Budget Option from the Desktop panel, click the 'New' icon:

- **Budget Type:** Budgets may be entered for WIP (Chargeable & Non-Chargeable), Fees or Cash.
- **Yearly or Period Budget:** This will determine how many figure columns will be input based on the Period Definition in settings (normally monthly). Non-Chargeable could be Yearly whereas Cash or Fees could be Monthly.
- **Budget Analysis:** This will determine how the budget is input for each Client/Job level. For Non-Chargeable budgets you will only have options by Staff or by Staff & WIP Analysis. Otherwise your options will be by Office, Department, Partner, Manager and Lead Staff.
- **Budget by:** This will determine how the budget is input i.e. will you be inputting by Client or by Job or a Summary. If you select Summary, If your budget analysis selection was 'Partner' then you will be able to
- **Description:** The name of the budget will be automatically generated from the selections made. This can be edited.

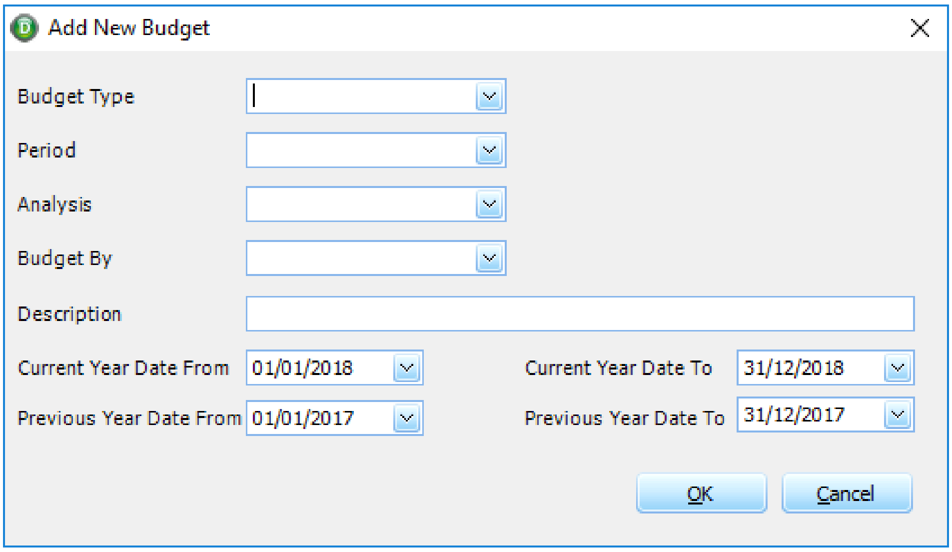
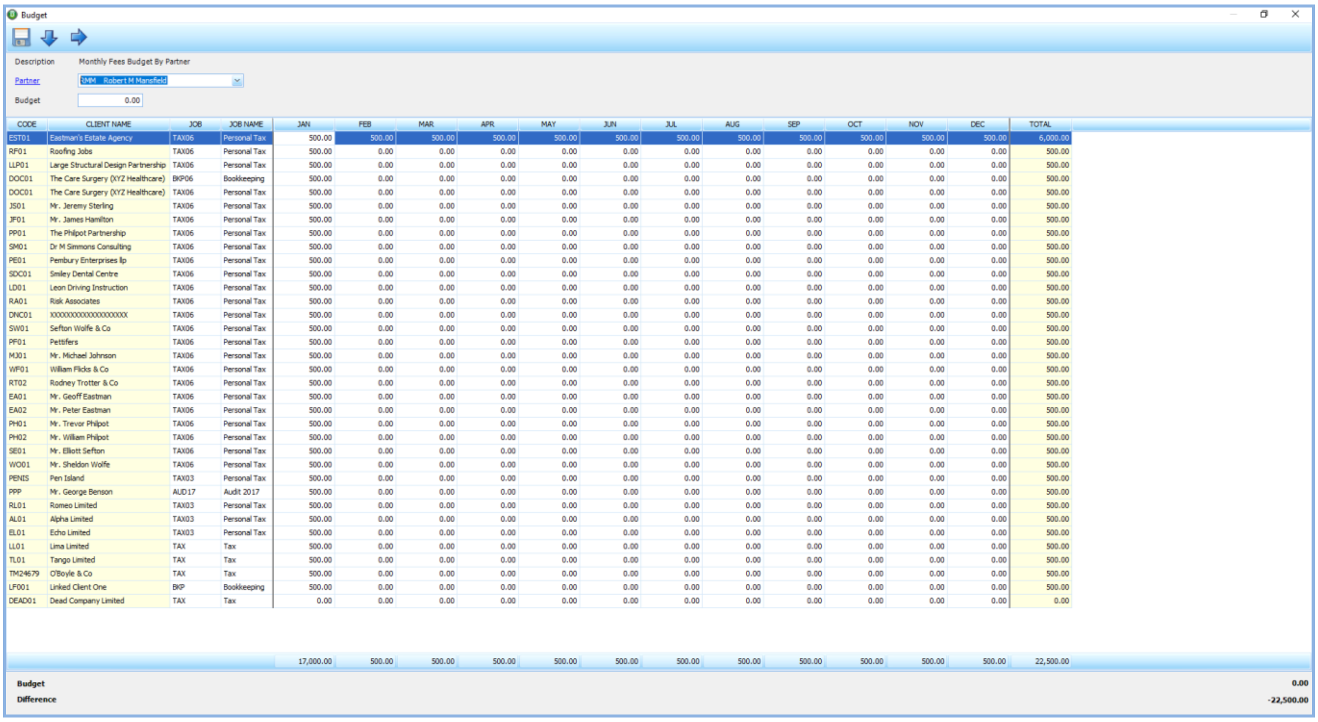


Figure 2 – Add New Budget

INPUTTING BUDGET DETAILS

To input the budget details select the appropriate budget by double clicking or right clicking and selecting ‘Open’. The input screen will differ based on the Budget Type setup, for example in the image below the input is monthly fee budgets by Client, by Partner. Firstly, select the Partner; the list of clients associated with the partner will be displayed. Secondly, enter in the Total Fees budget for the Partner for the Year. You can then start to enter in the budgets.

There are two icons on the menu, Fill Right and Fill Down to assist with input. Fill Right can be used where you want the same figure for each month for each Client e.g. monthly management accounts. Fill Down is useful where the same figure will be billed in a particular month for every Client e.g. Personal Tax returns.


Budget

Description Monthly Fees Budget By Partner

Partner RMM Robert M Mansfield

Budget 0.00

CODE	CLIENT NAME	JOB	JOB NAME	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
EST01	Eastman's Estate Agency	TAX06	Personal Tax	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	6,000.00
RF01	Roofing Jobs	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
LLP01	Large Structural Design Partnership	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
DOC01	The Care Surgery (XYZ Healthcare)	BKP06	Bookkeeping	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
DOC01	The Care Surgery (XYZ Healthcare)	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
JS01	Mr. Jeremy Sterling	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
JF01	Mr. James Hamilton	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
PP01	The Philpot Partnership	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
SM01	Dr M Simmons Consulting	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
PE01	Pembury Enterprises llp	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
SDC01	Smiley Dental Centre	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
LD01	Leon Driving Instruction	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
RA01	Risk Associates	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
DNC01	XXXXXXXXXXXXXXXXXX	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
SW01	Sefton Wolfe & Co	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
PF01	Pettifers	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
MJ01	Mr. Michael Johnson	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
WF01	William Flicks & Co	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
RT02	Rodney Trotter & Co	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
EA01	Mr. Geoff Eastman	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
EA02	Mr. Peter Eastman	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
PH01	Mr. Trevor Philpot	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
PH02	Mr. William Philpot	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
SE01	Mr. Elliott Sefton	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
WO01	Mr. Sheldon Wolfe	TAX06	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
PENIS	Pen Island	TAX03	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
PPP	Mr. George Benson	AUD17	Audit 2017	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
RL01	Romeo Limited	TAX03	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
AL01	Alpha Limited	TAX03	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
EL01	Echo Limited	TAX03	Personal Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
LL01	Lima Limited	TAX	Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
TL01	Tango Limited	TAX	Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
TM24679	O'Boyle & Co	TAX	Tax	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
LF001	Linked Client One	BKP	Bookkeeping	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
DEAD01	Dead Company Limited	TAX	Tax	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
				17,000.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	500.00	22,500.00

Budget 0.00

Difference -22,500.00

Figure 3 - Budget Input

BUDGET REPORTING

The budget report allows the user to export all of the relevant details to Excel. To run the report press the 'Print' button on the toolbar, select the appropriate criteria for running the report and click OK.

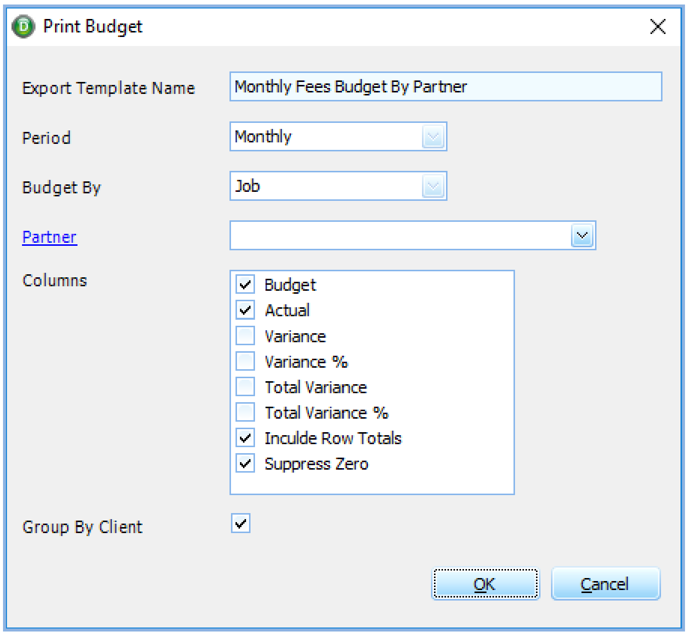
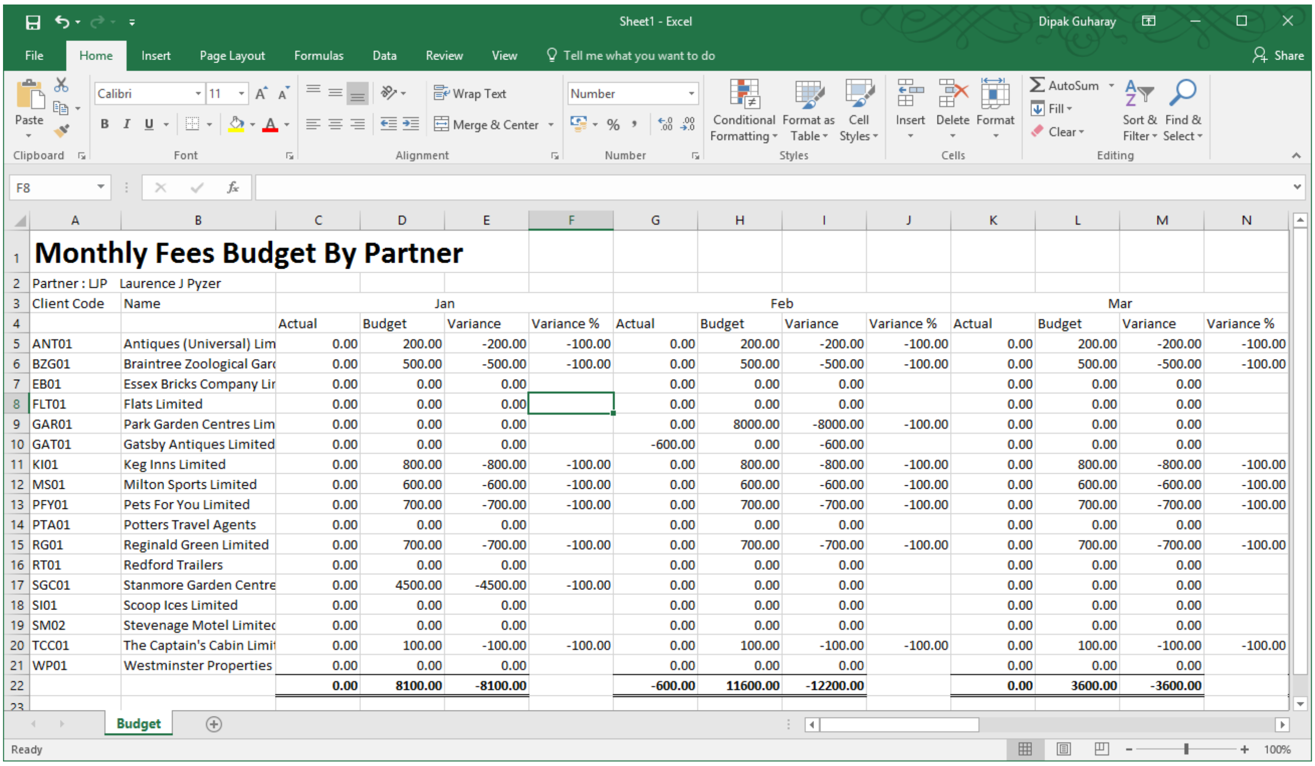


Figure 4 – Budget Report

The Excel sheet will then be generated with the relevant details.



Monthly Fees Budget By Partner

Partner : LJP Laurence J Pyzer

Client Code	Name	Jan				Feb				Mar			
		Actual	Budget	Variance	Variance %	Actual	Budget	Variance	Variance %	Actual	Budget	Variance	Variance %
ANT01	Antiques (Universal) Lim	0.00	200.00	-200.00	-100.00	0.00	200.00	-200.00	-100.00	0.00	200.00	-200.00	-100.00
BZG01	Braintree Zoological Garc	0.00	500.00	-500.00	-100.00	0.00	500.00	-500.00	-100.00	0.00	500.00	-500.00	-100.00
EB01	Essex Bricks Company Lir	0.00	0.00	0.00		0.00	0.00	0.00		0.00	0.00	0.00	
FLT01	Flats Limited	0.00	0.00	0.00		0.00	0.00	0.00		0.00	0.00	0.00	
GAR01	Park Garden Centres Lim	0.00	0.00	0.00		0.00	8000.00	-8000.00	-100.00	0.00	0.00	0.00	
GAT01	Gatsby Antiques Limited	0.00	0.00	0.00		-600.00	0.00	-600.00		0.00	0.00	0.00	
KI01	Keg Inns Limited	0.00	800.00	-800.00	-100.00	0.00	800.00	-800.00	-100.00	0.00	800.00	-800.00	-100.00
MS01	Milton Sports Limited	0.00	600.00	-600.00	-100.00	0.00	600.00	-600.00	-100.00	0.00	600.00	-600.00	-100.00
PFY01	Pets For You Limited	0.00	700.00	-700.00	-100.00	0.00	700.00	-700.00	-100.00	0.00	700.00	-700.00	-100.00
PTA01	Potters Travel Agents	0.00	0.00	0.00		0.00	0.00	0.00		0.00	0.00	0.00	
RG01	Reginald Green Limited	0.00	700.00	-700.00	-100.00	0.00	700.00	-700.00	-100.00	0.00	700.00	-700.00	-100.00
RT01	Redford Trailers	0.00	0.00	0.00		0.00	0.00	0.00		0.00	0.00	0.00	
SGC01	Stanmore Garden Centre	0.00	4500.00	-4500.00	-100.00	0.00	0.00	0.00		0.00	0.00	0.00	
SI01	Scoop Ices Limited	0.00	0.00	0.00		0.00	0.00	0.00		0.00	0.00	0.00	
SM02	Stevenage Motel Limitec	0.00	0.00	0.00		0.00	0.00	0.00		0.00	0.00	0.00	
TCC01	The Captain's Cabin Limit	0.00	100.00	-100.00	-100.00	0.00	100.00	-100.00	-100.00	0.00	100.00	-100.00	-100.00
WP01	Westminster Properties	0.00	0.00	0.00		0.00	0.00	0.00		0.00	0.00	0.00	
		0.00	**8100.00**	**-8100.00**		**-600.00**	**11600.00**	**-12200.00**		**0.00**	**3600.00**	**-3600.00**	

Figure 5 – Excel Export

CREDIT CONTROL

INTRODUCTION

We have introduced a new Credit Control module which allows the user to easily access credit control information and send out credit control specific messages via E-Mail, Letter etc. The browse screen will show the aged debtors, which can be easily sorted, searched and filtered.

MAIN CREDIT CONTROL SCREEN

To access the Credit Control module select ‘Credit Control’ from the Fees Ledger menu. You will be asked if you wish to ‘Calculate Client Ageing’, say yes to allow the system to calculate the fees ledger ageing and show up to date figures.

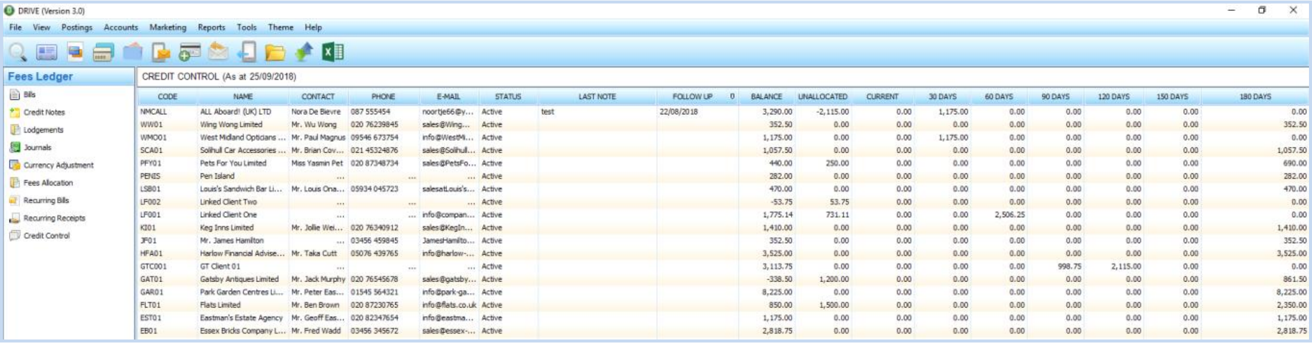


Figure 6 – Credit Control Browse

MAIN FEATURES

- **Ledger Card:** If selected the Clients Fees Ledger Card will be displayed.

- **E-Mail Statements:** If selected you will have the option to send a statement to the highlighted client.

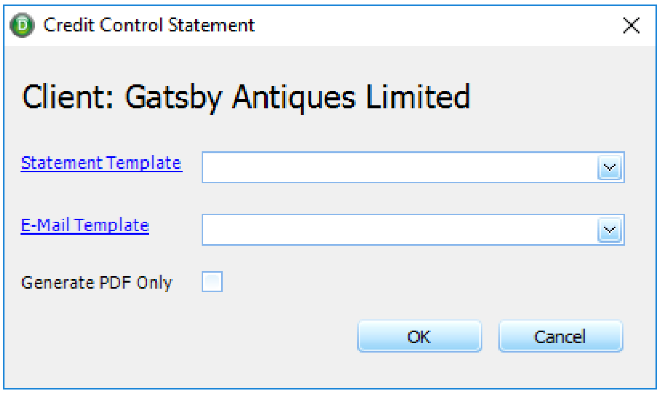


Figure 7 – Credit Control Statement

- **Communications:** If selected, ‘Credit Control’ type communication for this client will be displayed.

- **Mail Merge:** If selected this will display the standard Mail Merge document selection screen.

- **SMS**: If selected this will display the standard SMS Merge template selection screen.
- **Add Note**: If selected this will open a standard new memo pre-populated with the Client and Communication Type = Credit Control. The Subject of the note will appear as the 'Last Note' on the credit control browse screen.
- **Add E-Mail**: If selected this will open the standard new E-Mail form pre-populated with the Client and the Communication Type = Credit Control.
- **Add Phone**: If selected this will open the standard Phone-Out form pre-populated with the Client and the Communication Type = Credit Control.
- **Edit Client Details:** If selected this will open the standard Edit Client Details form.
- **Calculate Client Ageing:** If selected this will open the screen below, giving options to enter the dates that the 'Ageing' is up to.

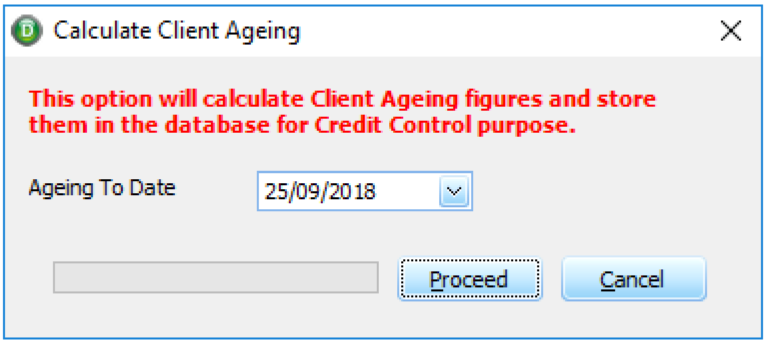


Figure 8 – Calculate Client Ageing Screen

- **Excel Export:** If selected this will export the credit control browse screen details into an excel spreadsheet.

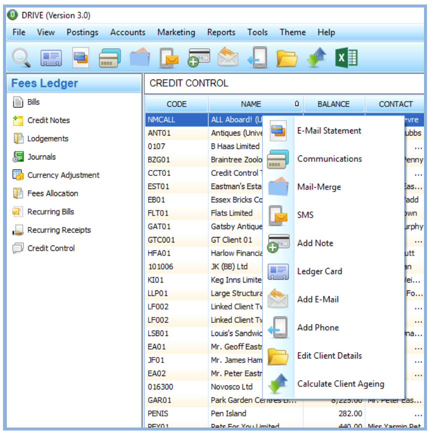


Figure 9 – Credit Control Options

ALERT MANAGER

INTRODUCTION

The new Alert Manager will allow you to setup the system so that it will automatically deliver warnings and information messages to Staff by E-mail or SMS reminding them about missed deadlines etc. You will have options for the criteria and frequency for delivering messages. For example, warnings for incomplete time sheets can be delivered daily coming up to the end of the week to each manager or partner, this data may be aggregated for all relevant staff rather than individual emails for each staff member who has not filled in their time. The key criteria for each alert is:

- Who gets the Alert?
- When do they get it?
- How Frequently do they get it?
- How is it Delivered?

The initial available alerts are:

- Timesheet Alerts
- Diary Reminders
- Deadlines Due
- Fees Budgets/Limits Reached
- WIP Budgets/Limits Reached

Example - Managing incomplete Time Sheets:

Question	Answer
1. Who gets the alert?	The Staff Member should get an individual alert. The Manager and optionally Partner should get an alert listing the staff members that have incomplete Time Sheets.
2. When do they get it?	The day after the end of the timesheet period.
3. How frequently do they get it?	The Staff Member should get an alert daily after the end of the timesheet period. The Manager and optionally Partner should get the same alert.
4. How is it delivered?	The Staff Member should get the alert by e-mail. The Manager and Partner should get the alert by e-mail and SMS.

SETTING UP ALERTS

To setup the Alerts select Tools, Alert Manager Setup, the following screen appears

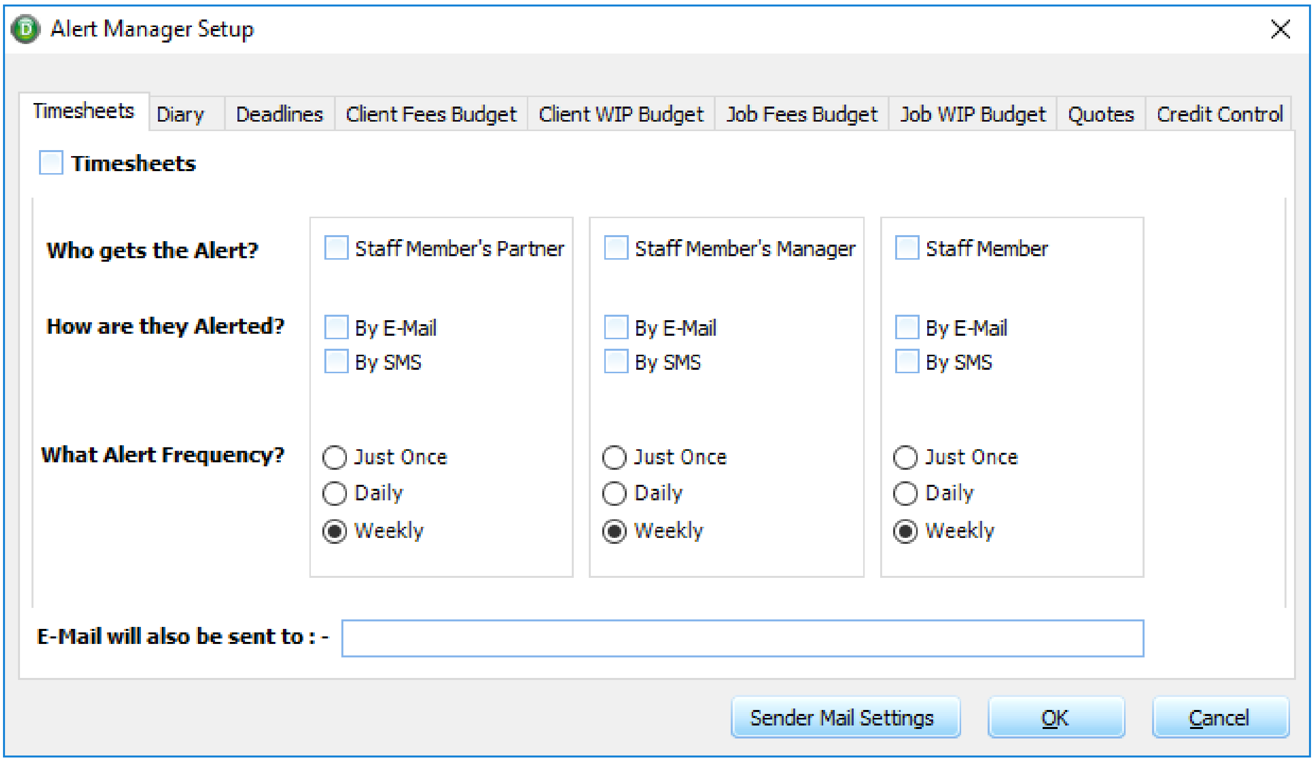


Figure 10 - Alert Manager Setup

If you intend to use E-Mail as your delivery mechanism you must setup a sender e-mail address. If your practice has a 'no-reply' e-mail address then we would recommend that you use this.

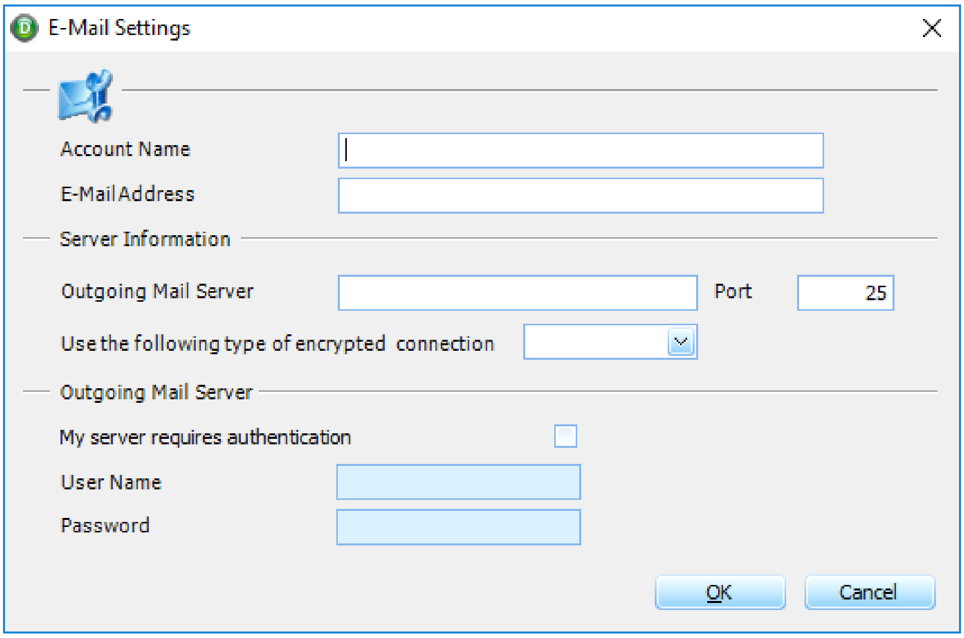


Figure 11 - Sender Mail Settings

OPERATION AND SERVER SETUP

In order for Alerts to be delivered the Alert Manager needs to be installed on your Server. This service will periodically poll your data for any triggered alerts and generate the appropriate e-mails. This can be downloaded by clicking http://www.relate-software.com/downloads/drive/Updates/AlertManager(1.0 Build 3).exe.

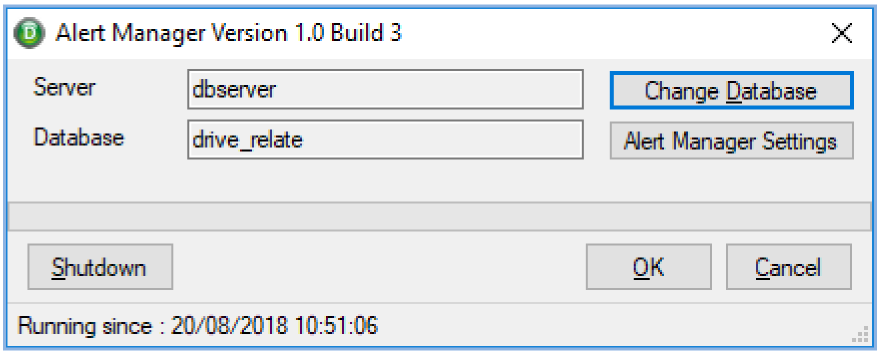


Figure 12 - Alert Manager

OUTLOOK INTEGRATION

INTRODUCTION

Outlook integration has been greatly improved with particular emphasis on the development of a replacement for the ‘Send to DRIVE’ Add-in in Outlook.

Now instead of having to remember to send emails to DRIVE, both incoming and outgoing, the email form itself has been customised to include the appropriate DRIVE fields similar to the old ‘Send to DRIVE’ button.

OUTLOOK E-MAIL FORM CHANGES

When you create a new e-mail or open up an incoming e-mail there will be a new DRIVE Panel at the bottom of the form, this is similar in operation to the old ‘Send to DRIVE’. The Staff Member only needs to be selected once, after that it will be saved for subsequent e-mails. The Client, Job and Contact will be auto filled where possible on both incoming and outgoing e-mails.

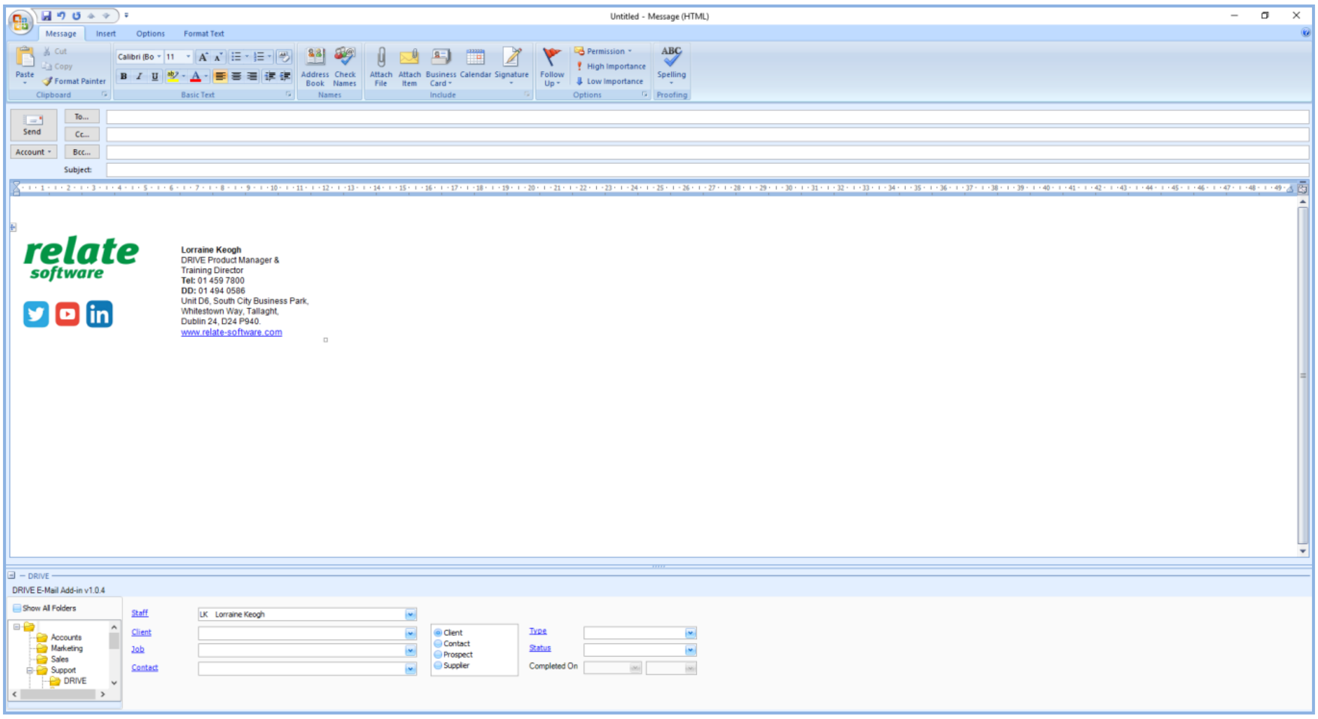


Figure 13 - Outlook E-Mail

GDPR MODULE

MANDATORY STAFF PASSWORD

Staff passwords are now mandatory. On editing existing staff or creating new staff you will now be forced to enter and confirm a password. There is no restriction as to the length or types of characters to be used.

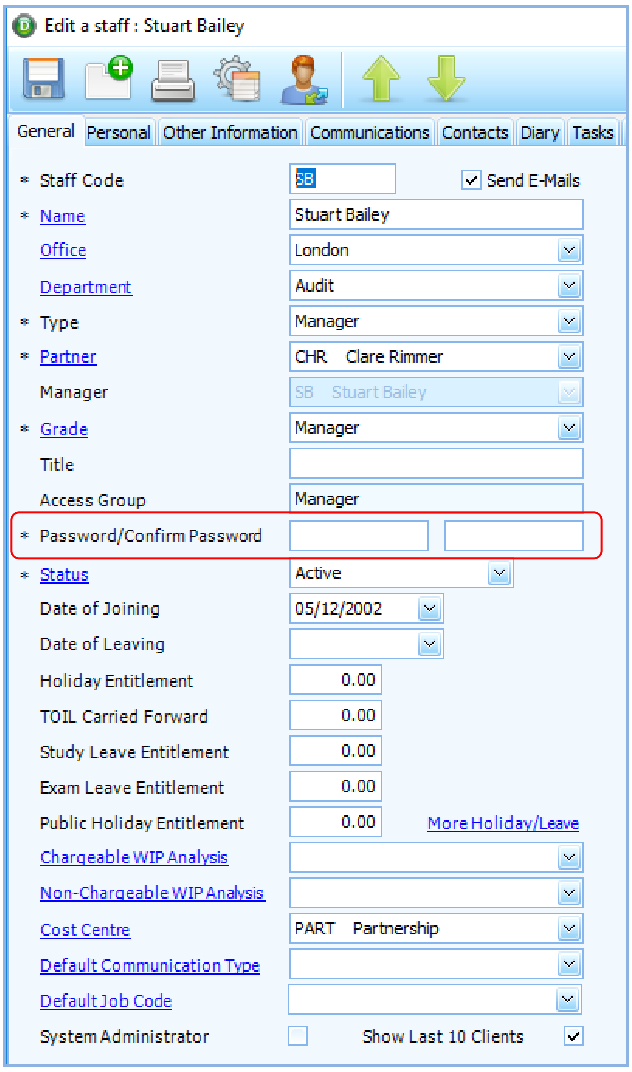


Figure 14 – Add/Edit Staff

ACCESS RIGHTS

Additional access rights have been added to the Access Functions section, as not all users should have access to these functions.

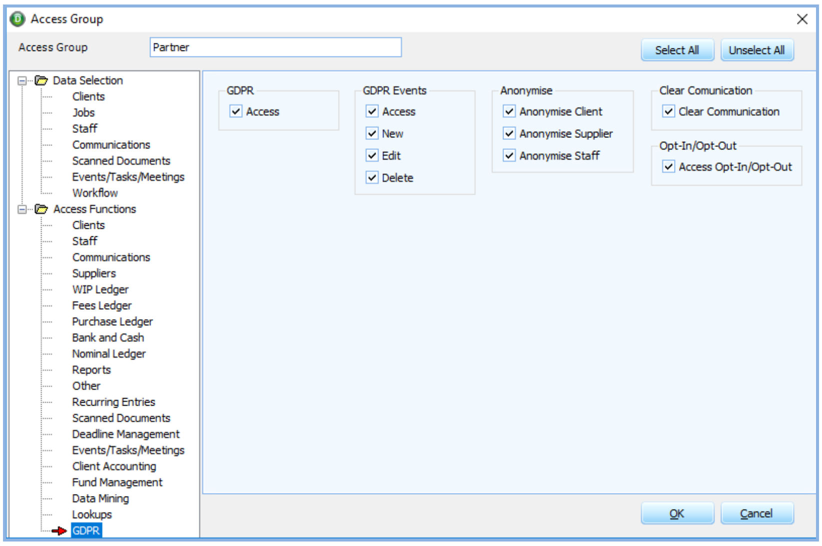


Figure 15 – Access Groups

CLIENTS AND CONTACTS

A new GDPR button will be visible on the Add/Edit Client & Contact screens, enabling you to record where consent has been received from individuals and when it was received.

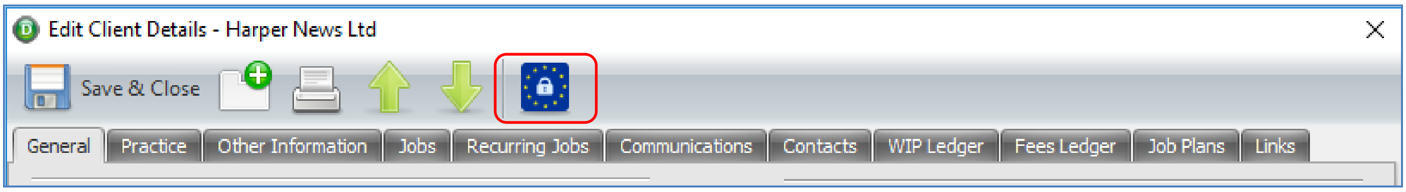


Figure 16 – Edit Client Details

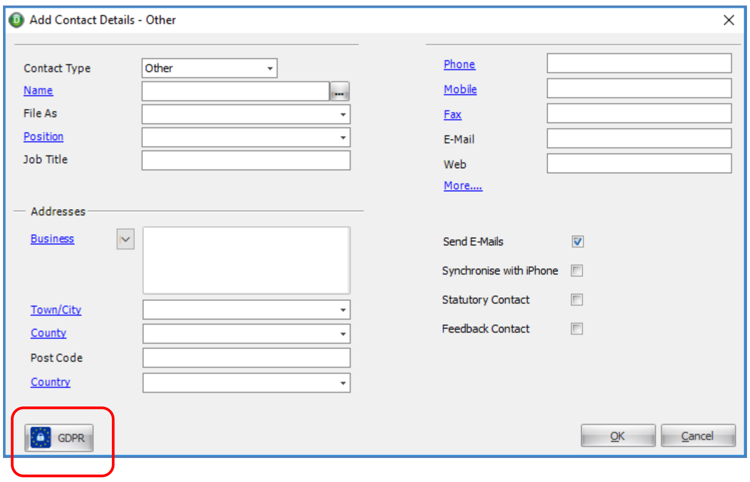


Figure 17 – Add Contact Details

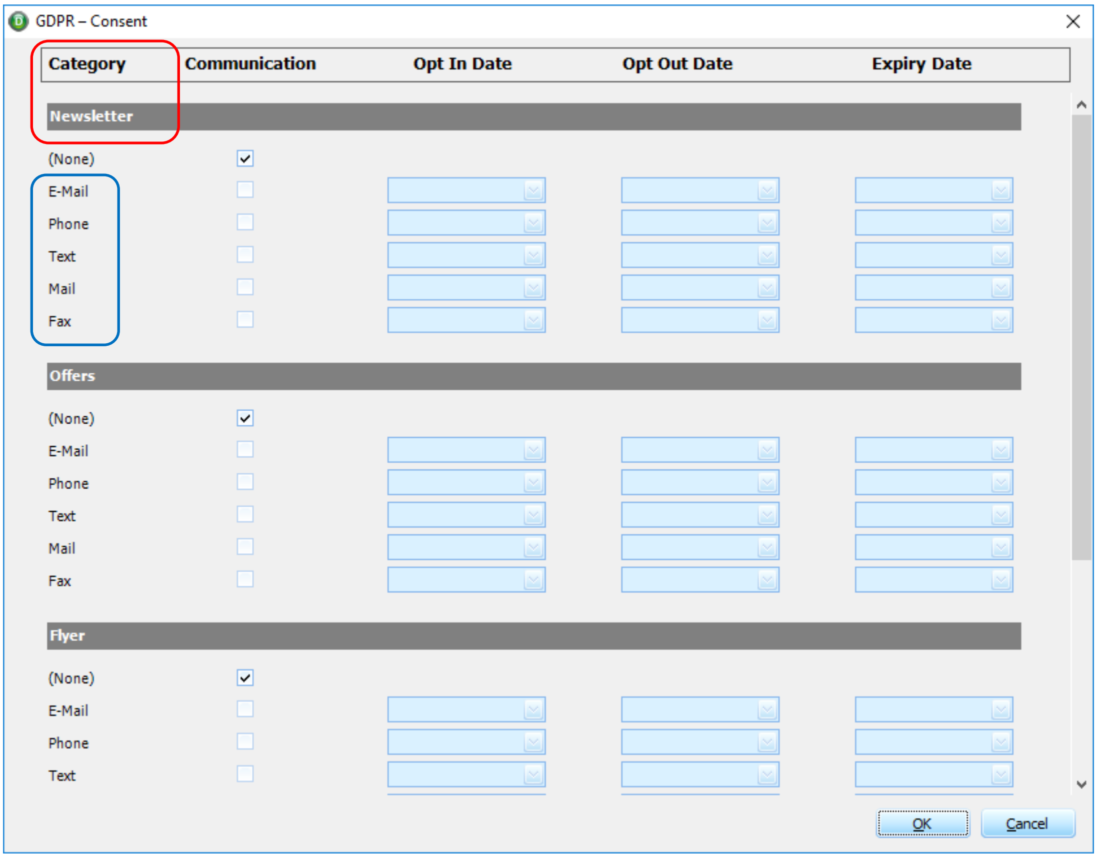


Figure 18 – GDPR Consent

To setup categories of communication or edit existing categories go to Tools, Lookups, GDPR Categories

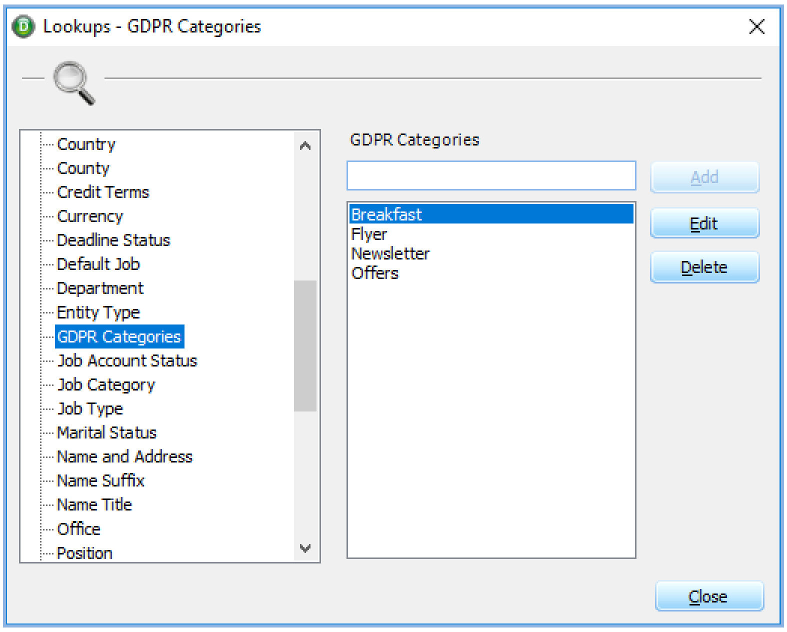


Figure 19 – GDPR Categories

There will be communication mechanism options, E-Mail, Phone, Text, Mail and Fax. You can select the mechanisms which are appropriate to your business and through which you need to record GDPR opt-ins.

You will be able to enter in the date that the Opt-In consent was received or if the person has Opted-Out, the date that they opted out. You will also be able to enter in an expiry date for the consent, if required. The staff member that updates these fields will be recorded along with a date and time updated.

ANONYMISE CLIENTS & CONTACTS

You will also have the option at the individual client/contact to anonymise their data. This will 'X' out the client or contacts name, address and contact details. This option is IRREVERSIBLE.

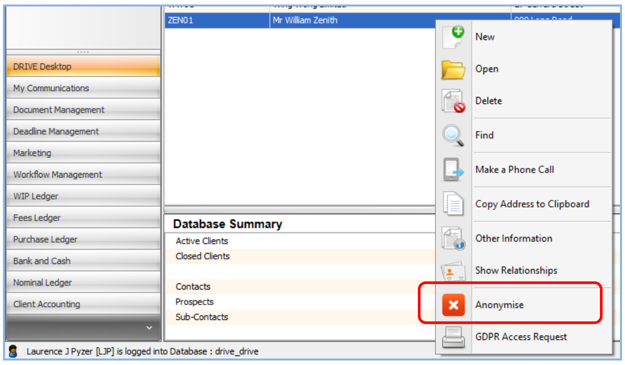


Figure 20 – Anonymise Client

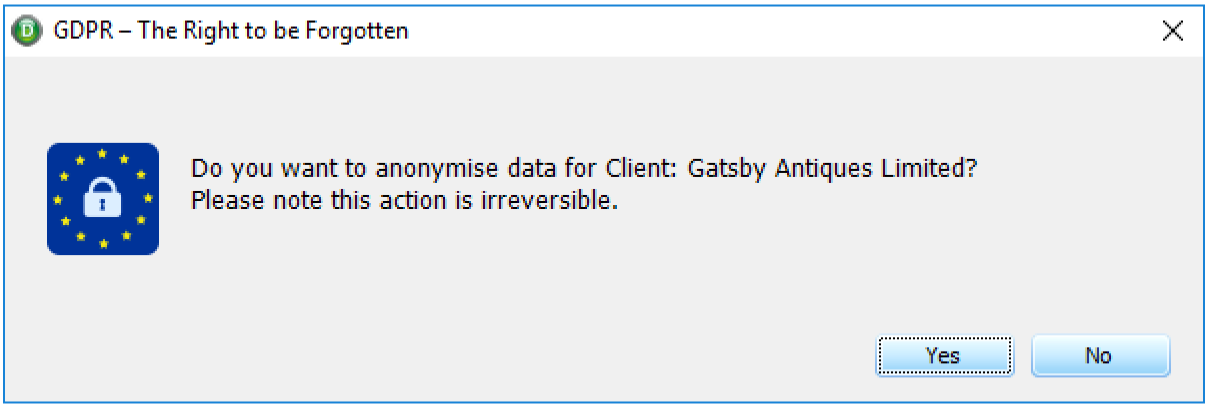


Figure 21 – Anonymise Client Confirmation Message

COMMUNICATION

You will have an option on all forms of communication to mark it as GDPR relevant.

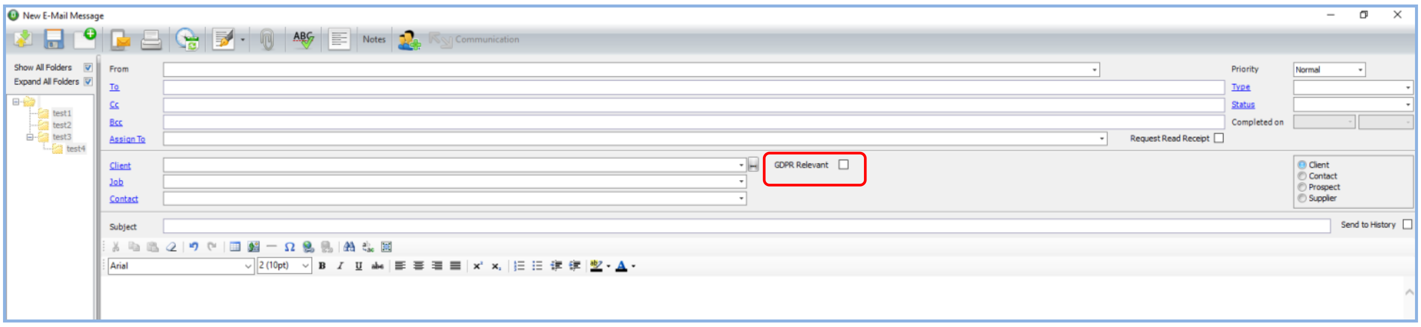


Figure 22 – New E-Mail

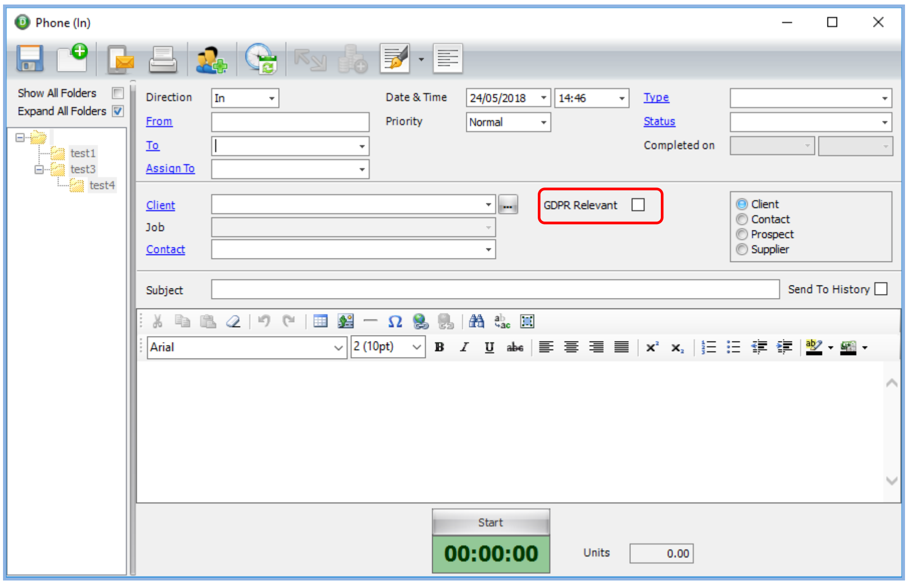


Figure 23 – Phone In

DATAMINING

When using the datamining functionality in the system to communicate with your clients, you will have a new tab for GDPR, which when selected will show the same screen as on clients/contacts, allowing you to select only the clients/contacts that have opted in by the specific communication method selected.

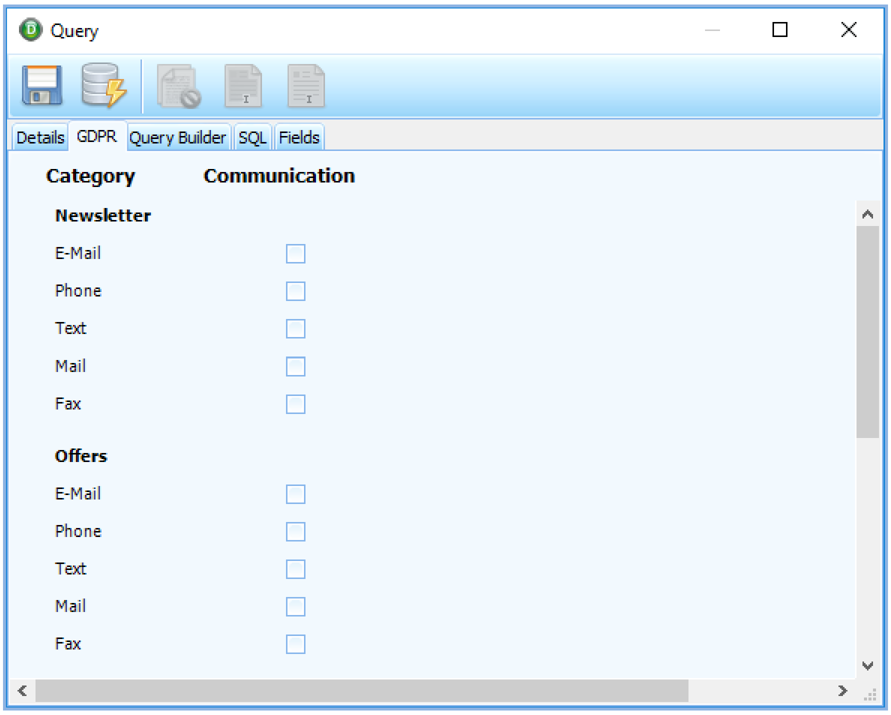


Figure 24 – Datamine

TOOLS, GDPR

In DRIVE Tools, you will also have the following options

- Clear Communications
- Anonymise Closed Clients, Closed Contacts, Closed Prospects, Closed Suppliers and Closed Staff
- Import Opt-In/Opt-Out List

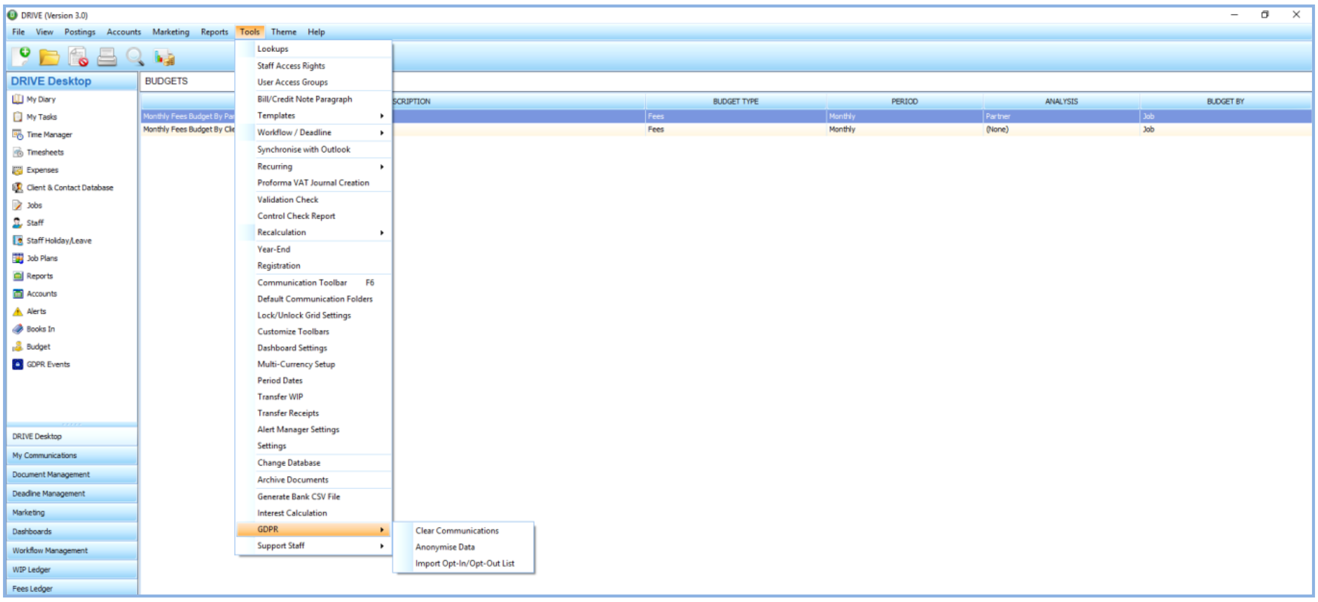


Figure 25 – GDPR Tools

CLEAR COMMUNICATIONS

You can clear communication for a specific client by clicking the dropdown and choosing the relevant client, for several clients by clicking the Client/Contact/Prospect hyperlink and selecting the appropriate ones or for all clients by leaving the client/contact/prospects field blank but ticking Client in the 'All' box.

You can enter in a date up to which you want to clear out the communications.

You can select to clear communications of specific types by ticking the relevant checkboxes.

You can also select to clear just communications that have been marked as 'GDPR Relevant' by ticking the GDPR Relevant Only checkbox. This will be recorded as a GDPR event.

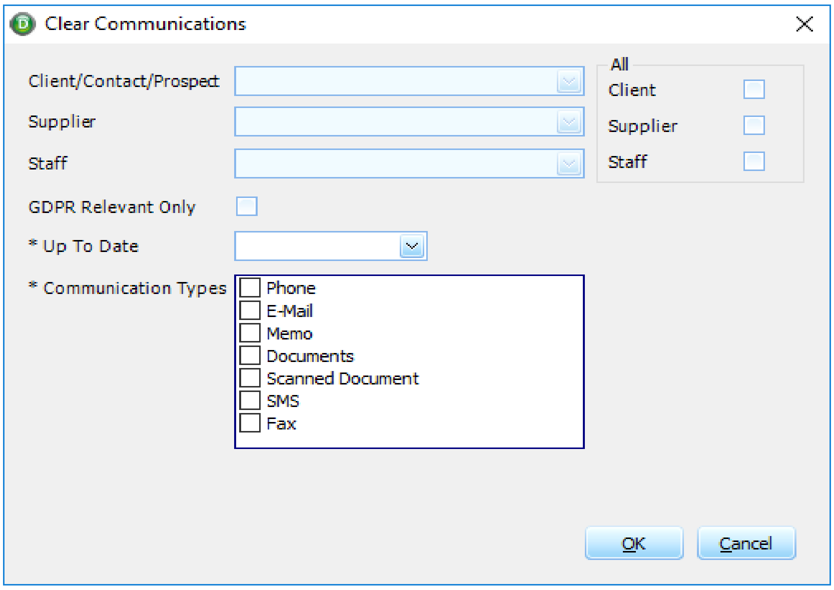


Figure 26 – Clear Communications

ANONYMISE CLOSED CLIENTS, CONTACTS, PROSPECTS, SUPPLIERS AND STAFF

You will also have options to anonymise all CLOSED clients, contacts, prospects, suppliers and staff. This will 'X' out all relevant personal details, including Other Information fields which will have an option to mark as GDPR Relevant.

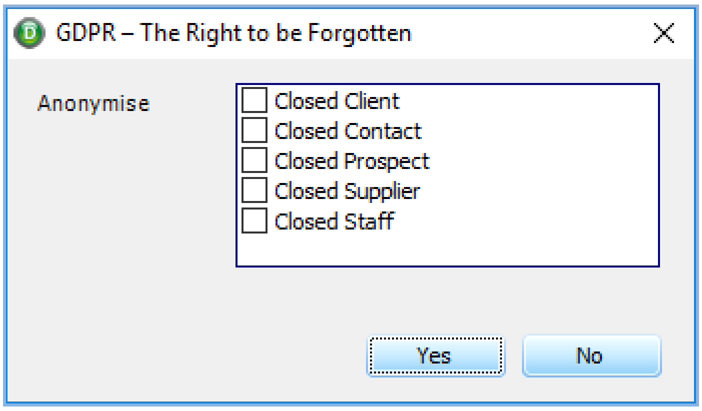


Figure 27 – Anonymise Closed Clients

These options are NOT reversible and therefore you will receive a confirmation message.

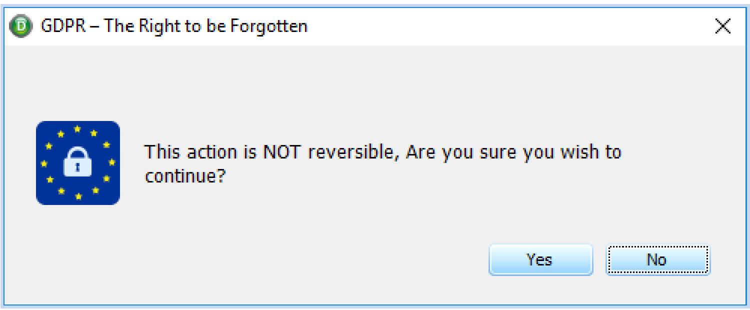


Figure 28 – Anonymise Confirmation Message

IMPORT OPT-IN/OPT-OUT LIST

This option will allow you to import Opt-Ins or alternatively Opt-Outs from a CSV file of e-mail addresses. This will 'Tick' or 'Untick' the relevant mechanism (or all mechanisms) and the appropriate category (or all categories).This will also record the staff member running the import and the date and time updated.

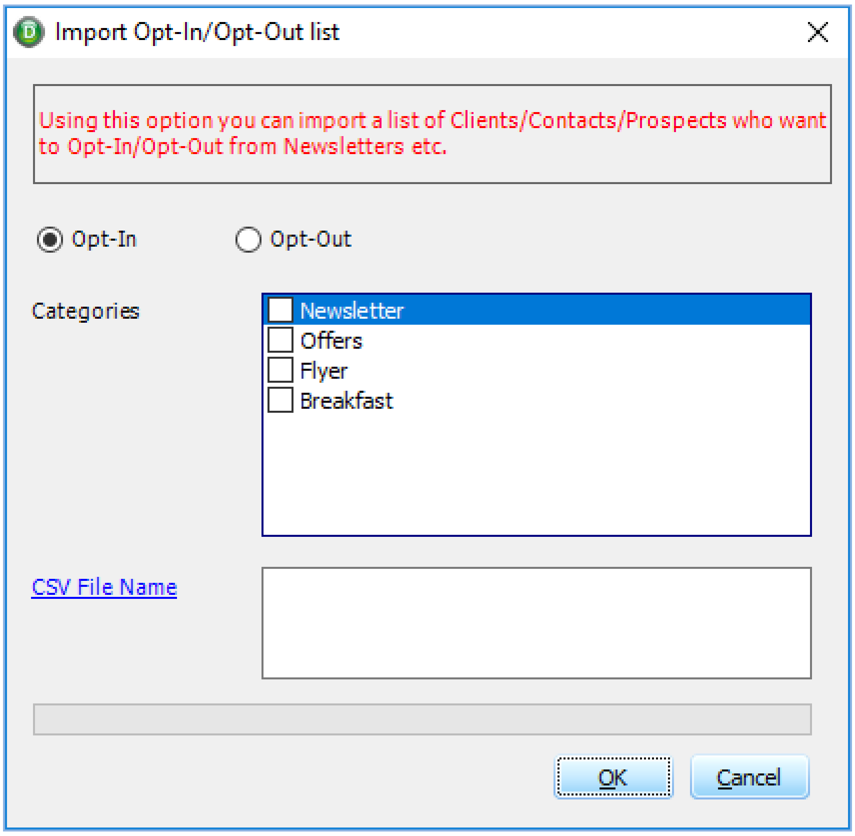


Figure 29 – CSV Import Opt-In/Out

GDPR ACCESS REQUEST/REPORT

Where a client makes a data access request you will be able to run this report, by highlighting the client, right clicking and selecting GDPR Access Request.

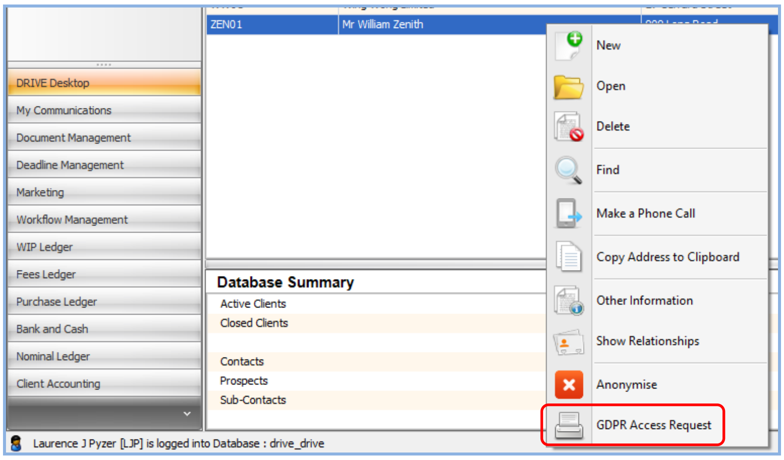


Figure 30 – Data Access Request

This report will show all the client general data, personal contact information as well as Communications history (where the communication is marked as GDPR relevant). It will also include any 'Other Information' fields which you marked as GDPR relevant.

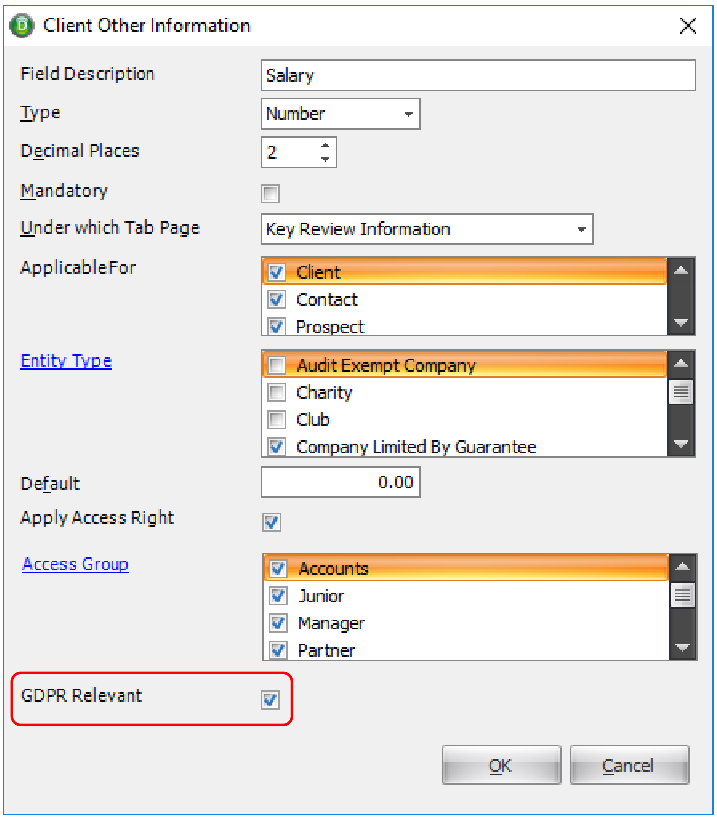


Figure 31 – Other Information

GDPR EVENTS

There will also be a log or audit trail, where you will be able to report on; exports from the system including datamines, subject access requests, rights to be forgotten requests and any Client/Supplier/Staff related reports which contain personal information.

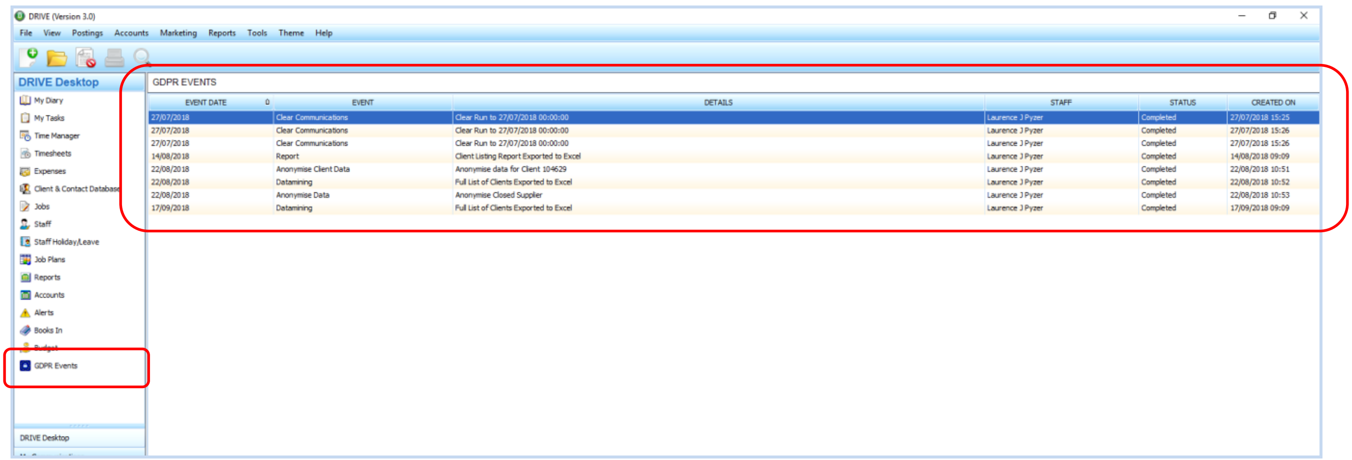


Figure 32 – GDPR Events

OTHER CHANGES

YEAR FILTER ON COMMUNICATION

A Year filter has been added to the Sent Items & History browse screens, allowing you to view only communications dated in a particular year.

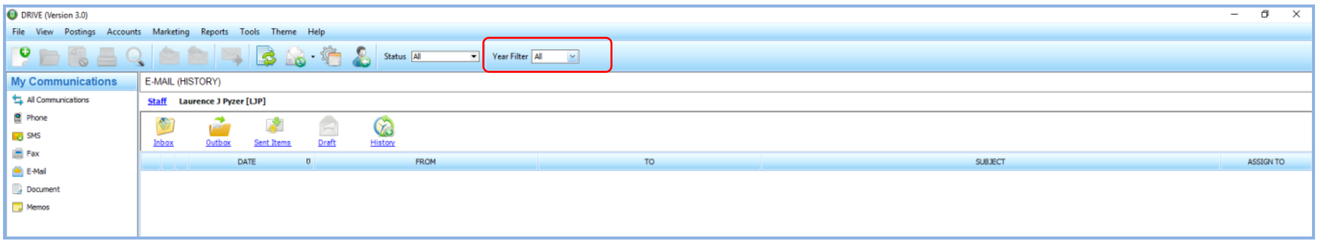


Figure 33 – Communication – Year Filter

EXPORT TO EXCEL

A new option to 'Export Report Data to Excel' has been added to the Reports Preview menu, this is different to the current export to Excel option, as it exports raw data, therefore making it easy to sort and filter, etc.

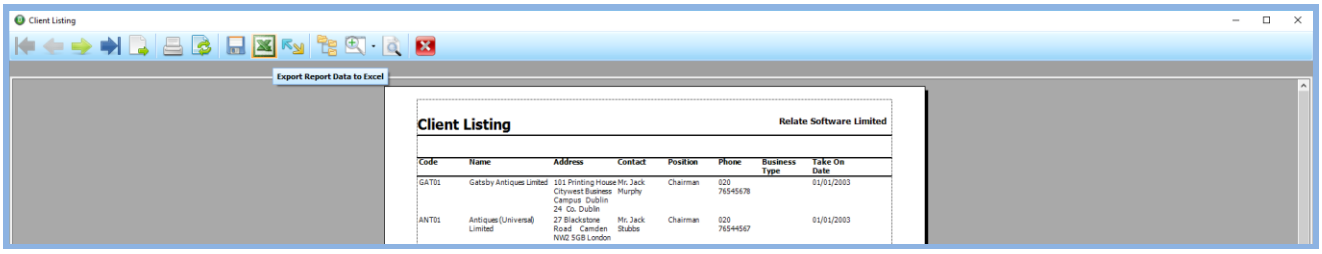


Figure 34 – Export to Excel

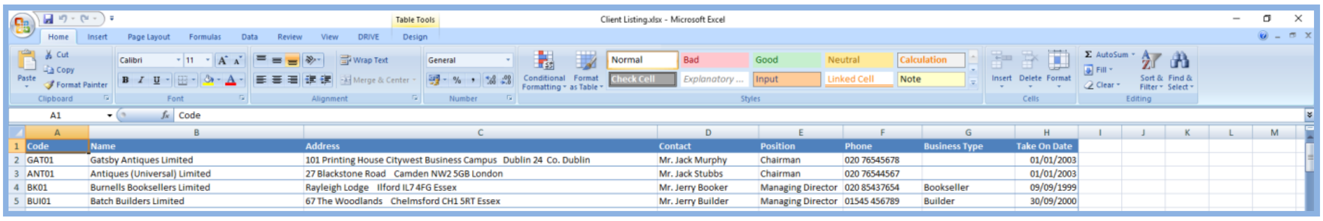


Figure 35 – Excel Export

NEW LOOK

The program has been given a new more modern look and feel. This includes new icons and additional themes.

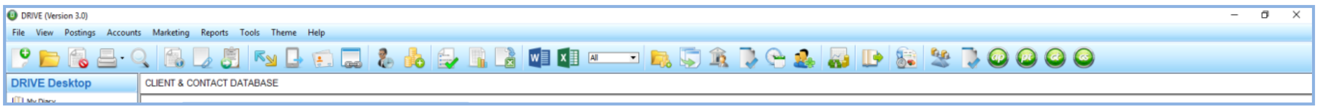


Figure 36 – New Icons

TIME MANAGER

You can now select to view the Time Manager by Department.

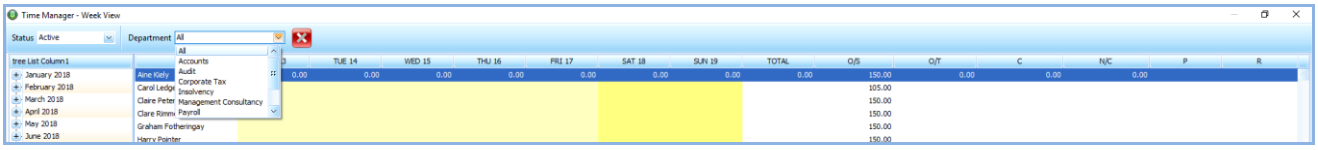


Figure 37 – Time Manager

CLIENT WIP RECONCILIATION REPORT

- Additional fields for Job Partner, Job Manager & Job Lead Staff have been added as available columns on this report.
- A new option to Include the Accrued WIP in the overall WIP Billed has been added to the report, if selected will treat the accrued wip as allocated.
- A new option to Include this prior year WIP has been added to the report, if selected will include wip posted in a prior year but billed in the current period.

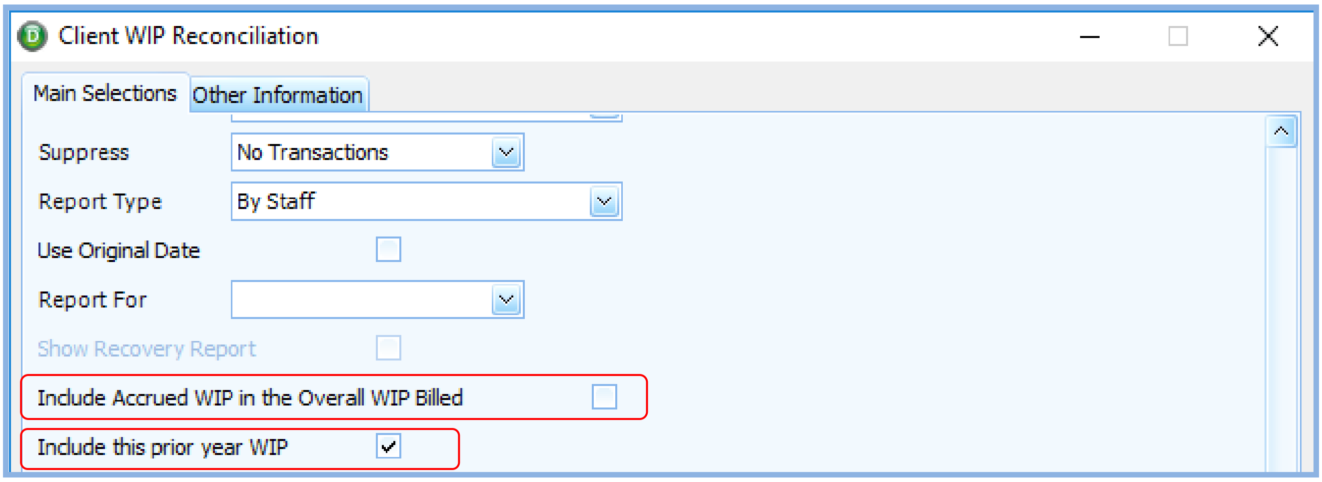


Figure 38 – Client WIP Reconciliation Report

STAFF DEADLINE DIARY

Additional optional columns for Client Partner, Client Manager and Lead Staff are now available to select on the Staff Deadline Diary browse.

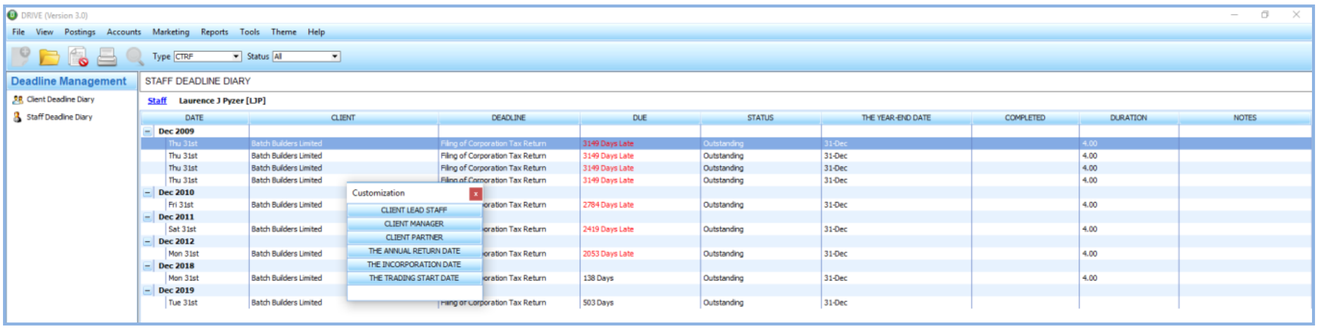


Figure 39 – Staff Deadline Diary

DATA MINING

Passport Number and Spouse's Date of Birth fields have been added to the available fields when datamining.

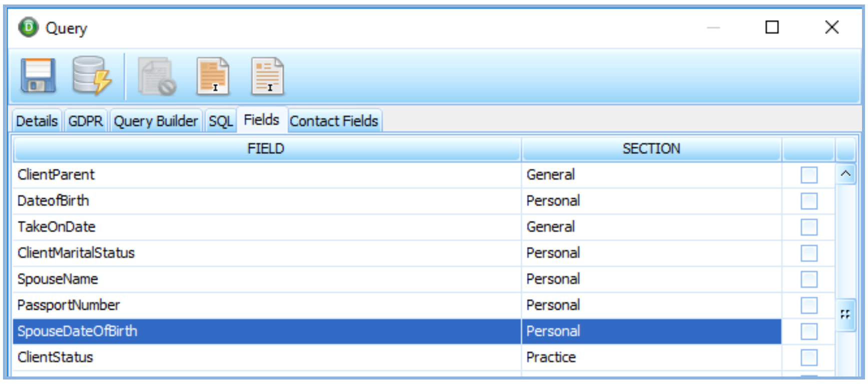


Figure 40 – Datamining Fields

BILLS – OPTION TO MAKE 'OTHER REF' MANDATORY

The Other Ref field which is available in Billing has been added in Tools, Bill/Credit Note Setup as an optional mandatory field.

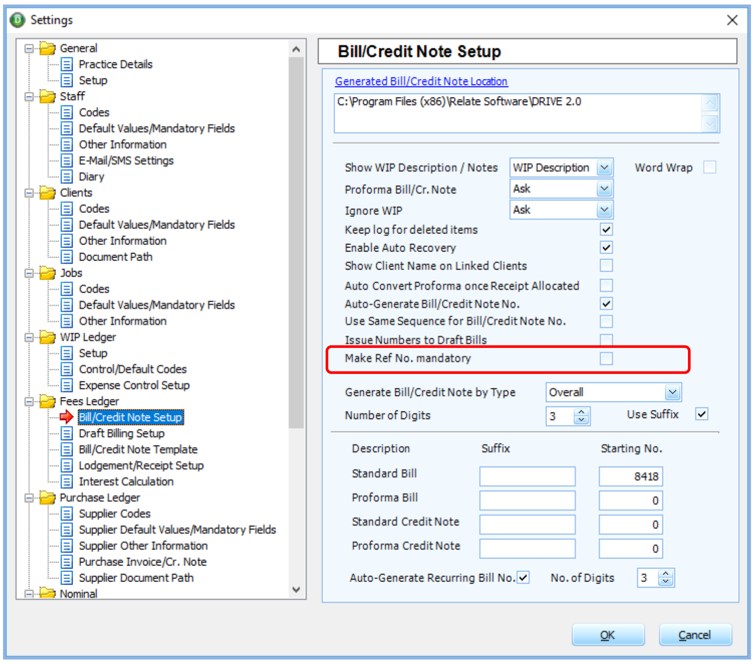


Figure 41 – Settings, Bill/Credit Note Setup

MULTIPLE STAFF SELECTION ON REPORTS

A new option has been added to allow for multiple staff members selection on the following reports:

- Client WIP Ledger
- Client WIP Analysis
- WIP Transaction Listing by staff
- WIP Transaction Listing

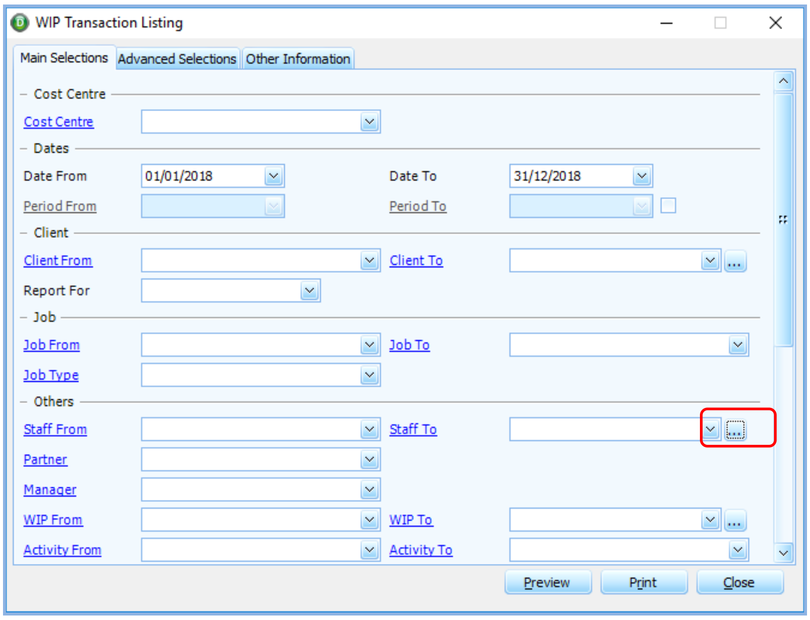


Figure 42 – WIP Transaction Listing Report

When you click the ellipsis/button then you will see the following screen where you can tick to select the appropriate staff members.

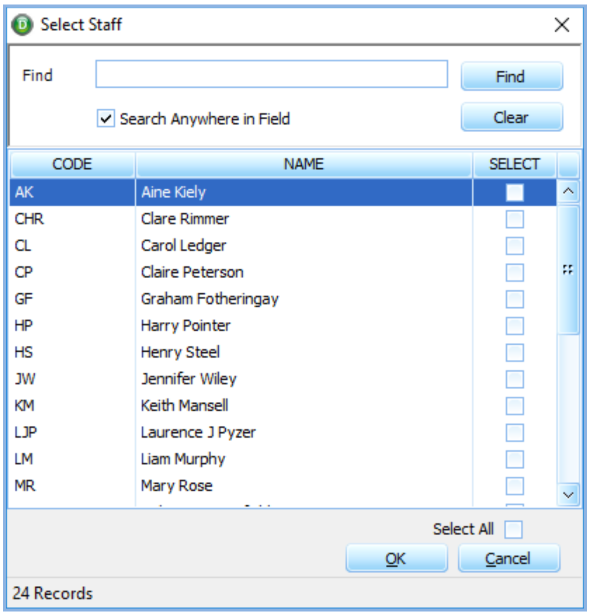
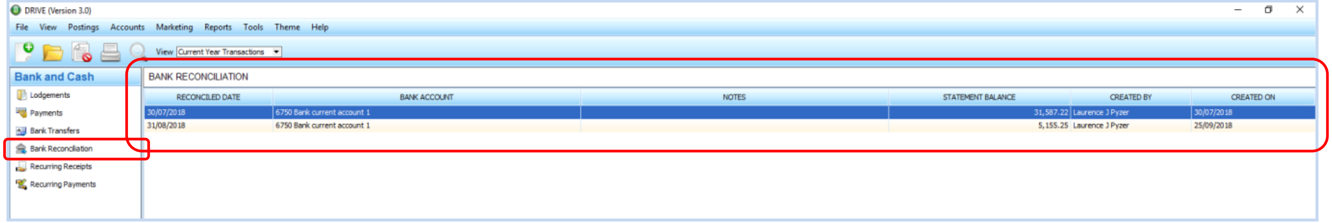


Figure 43 – Select Staff

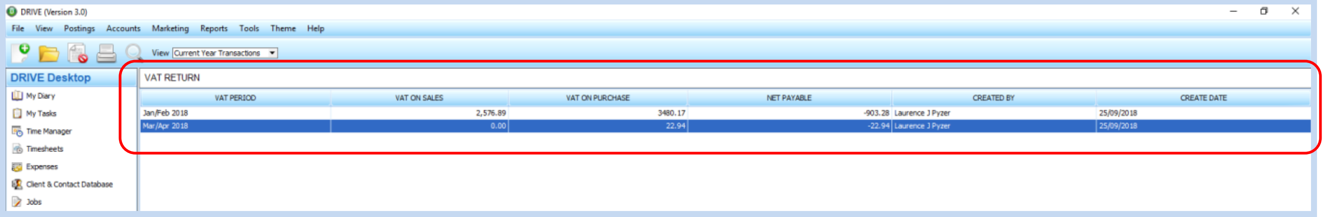
BANK RECONCILIATION

Accessible through Bank and Cash, Bank Reconciliations, you can now retain previously generated Bank Reconciliations.



VAT RETURN

Accessibly through the VAT Return report, you can now retain previously generated VAT Returns.



DATABASE SIZE – HELP ABOUT

The current size of your DRIVE database has been added to the Help, About, System Information screen.

FORMATTED TRIAL BALANCE – EXCEL EXPORT

An additional optional column to allow for the nominal description as a separate column has been added to the export.

WORKFLOW MANAGER

A new warning will be generated if creating new workflows that overlap with existing workflows, similar to the warning that is generated if they overlap with holidays.

CUSTOM DICTIONARY

The custom dictionary was previously stored in a temp folder; it will now be stored in the documents folder.

INTEREST CALCULATION

Journals will now be included in the amount when interest is being calculated.