RELEASE NOTES
for DRIVE

Version 3.3 Build 1

relate software

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INTRODUCTION

These release notes outline the enhancements introduced in DRIVE Version 3.3.1.

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 enhancements@relate-software.com

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.

BROWSES

BOOKS IN - JOB PARTNER AND JOB MANAGER COLUMNS ADDED

We have added two new available columns, Job Partner and Job Manager, in the **Books In** browse.

To add these columns to the browse, right-click on the column header and select **'Column Chooser'**, the following screen will appear

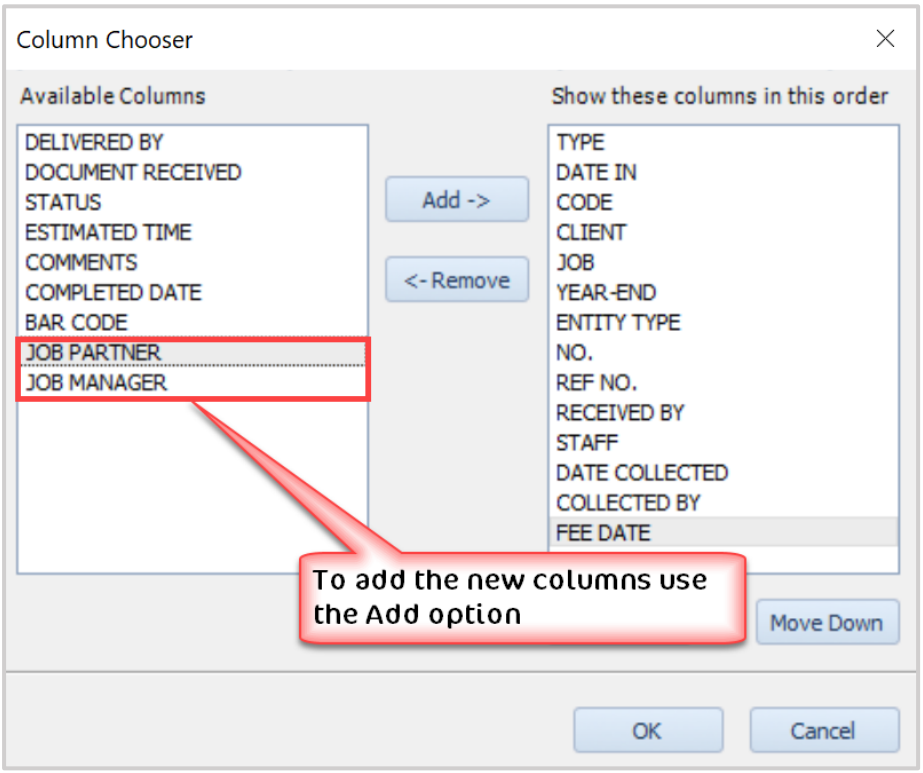


Figure: New - Available columns

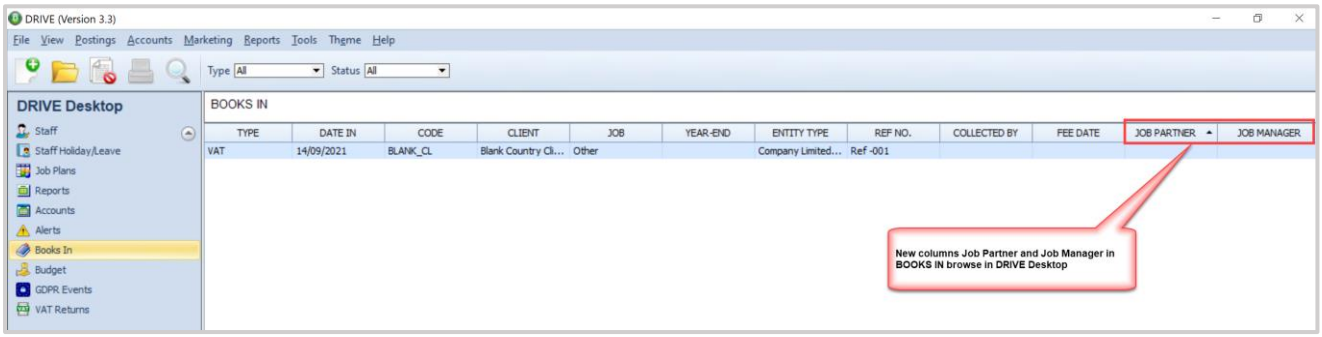


Figure: Job Partner and Job Manager in Books In browse

UK ONLY - VAT RETURN - RETURN STATUS ADDED

We have added a new available column, 'Return Status', to the VAT Return browse.

To add this column to the browse, right-click on the column header and select **'Column Chooser'**, the following screen will appear

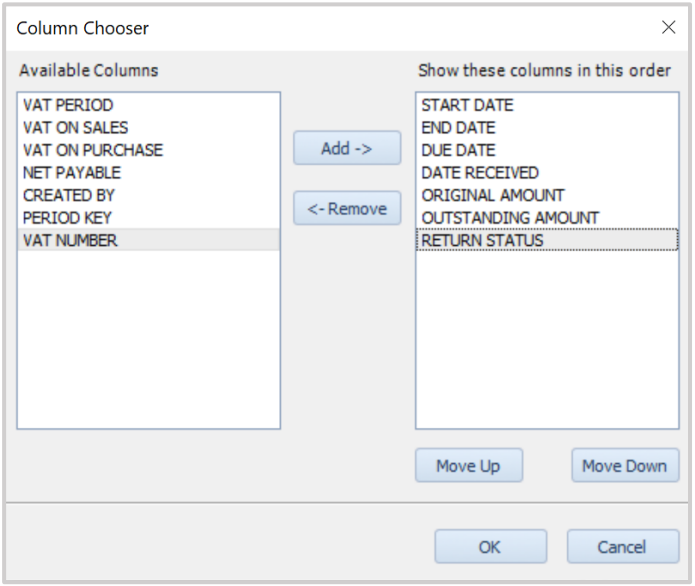


Figure: New - Available column

Note: this column is only available where the practice country is the United Kingdom i.e. for MTD.

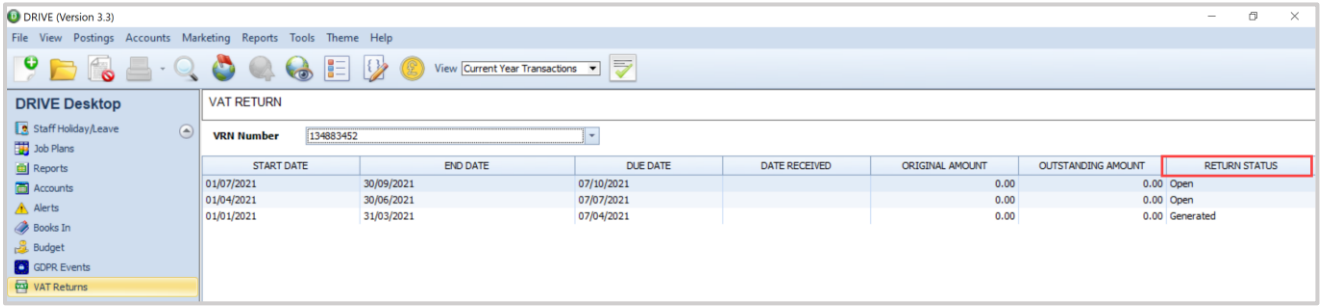


Figure: 'Return Status' column on MTD VAT Return Browse

BANK PAYMENTS – NON-SUPPLIER PAYEE DETAILS

In the **[Bank], [Payments]** browse, the **'Details'** field will display either the supplier name or if the payment is a non-supplier payment then it will display the **'Payee'** details entered.

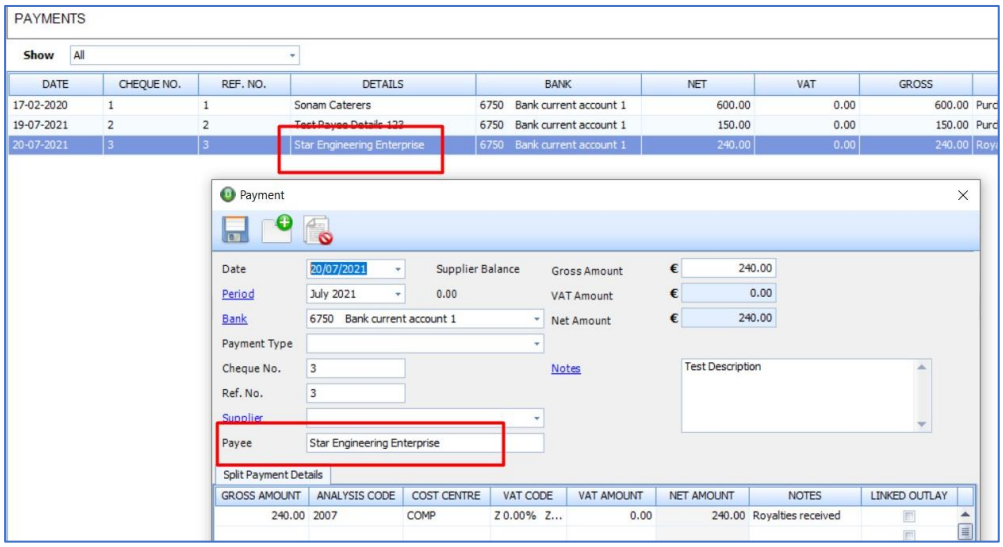


Figure: 'Payee' details display in 'Details' field

MY TASKS – CLIENT PARTNER AND MANAGER COLUMNS ADDED

We have added two new available columns, **'Partner'** and **'Manager'**, to the **[My Tasks]** browse.

To add these columns to the browse, right-click on the column header and select **'Column Chooser'**, the following screen will appear

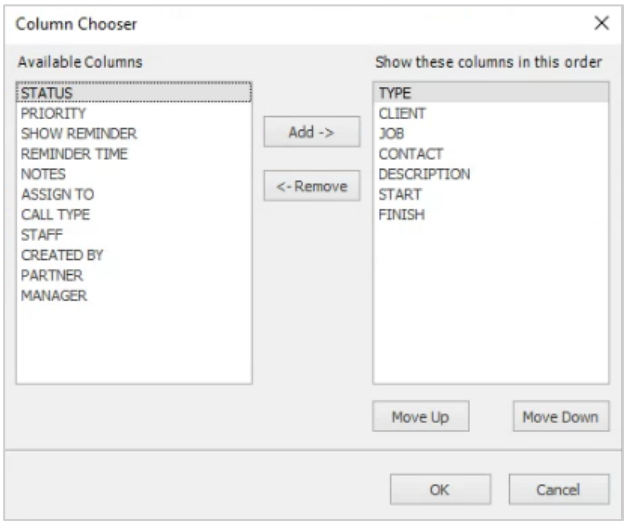


Figure: New Partner and Manager - Available columns

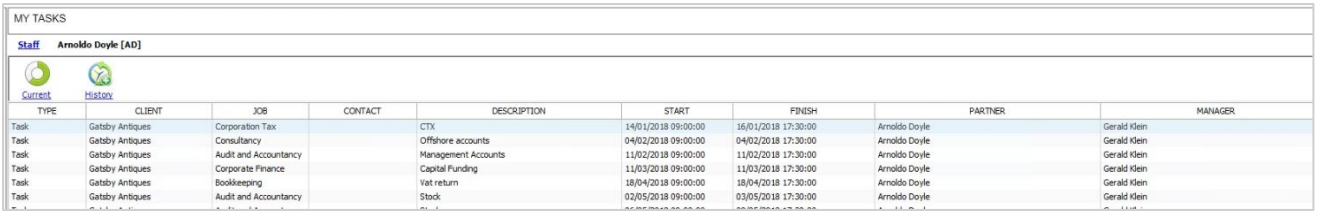


Figure: Browse with 'Partner' and 'Manager' columns added

JOBS – OTHER INFORMATION COLUMNS AVAILABLE

Job Other Information fields should now appear as available columns in the **[Jobs]** browse.

To add these columns to the browse, right-click on the column header and select **'Column Chooser'**, the following screen will appear

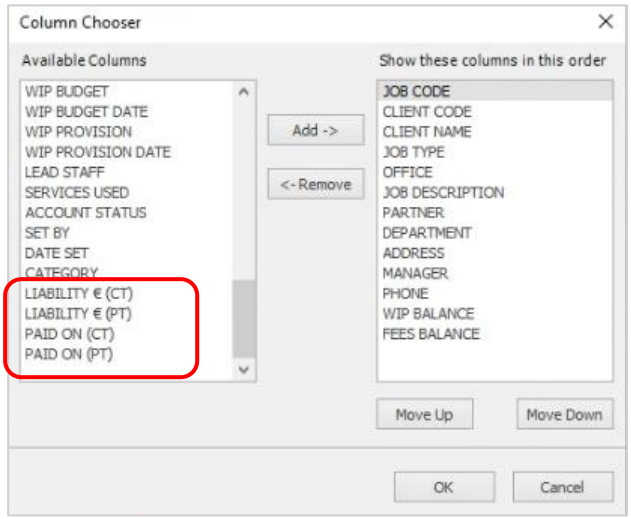


Figure: Sample Other Information - Available columns

Figure: Sample Other Information available columns

IMPORTS

STAFF CHARGE-OUT RATES

We have added a new feature to allow you to import updates to Staff Charge-out Rates, which you have prepared in an excel spreadsheet.

The logged in staff member must first be given access to this new feature. To give a staff member access to this new feature, you must go to **[Tools], [User Access Groups], [Access Functions], [Staff]** and tick **'Import Staff Rate'** checkbox.

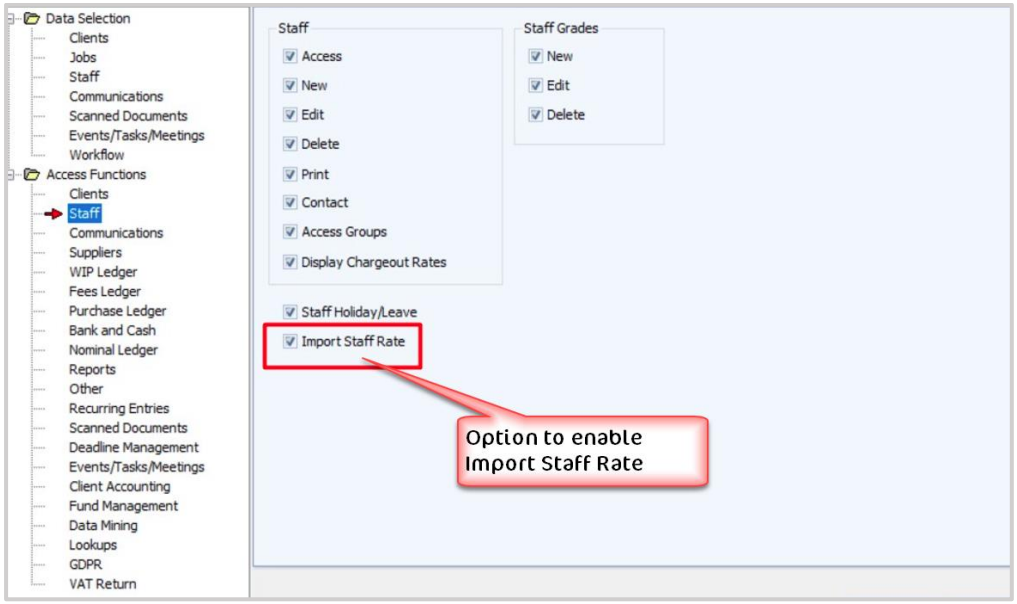
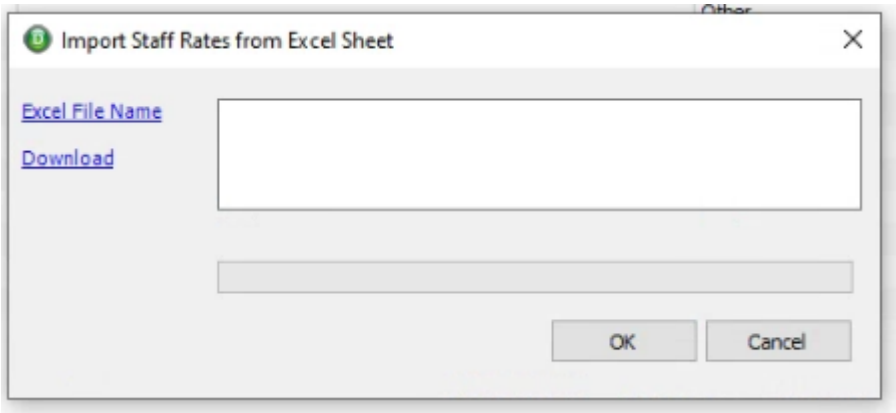


Figure: Option to enable Import Staff Rate

From **[DRIVE Desktop], [Staff]**, you should now see an icon for **'Staff Rate Import'** on the toolbar.

Figure: Staff Rate Import icon

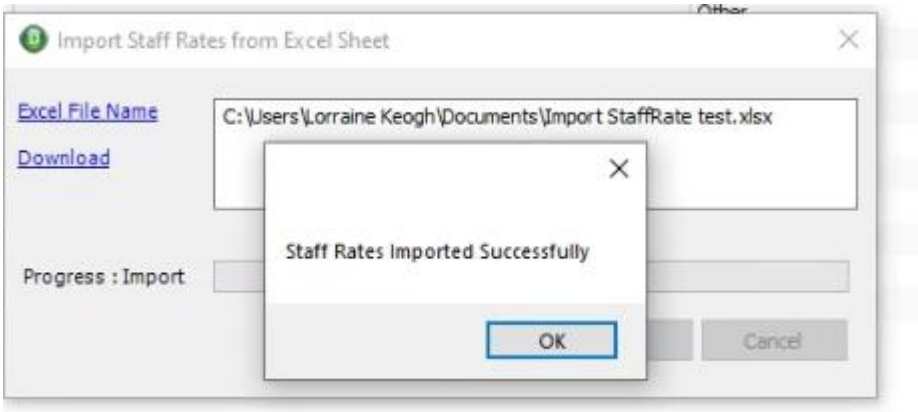


First, you will need to download the excel template, enter the required data and save the file.

	A	B	C	D	E	F	G	H	I	J
1	StaffCode	IsGradeRate	StaffGrade	DateFrom	DateUpto	ChargeoutRate	CostRate	TransferRate	Description	
2	AD	No	Partner	01-01-2021	31-12-2021	99	19	0	Standard 2021	
3										

Next, use the **'Excel File Name'** hyperlink to point to the location of the saved excel.

Then click **'OK'** to import the data.



When the import is complete you should get the following 'successful' message, click OK.

Recommendation: Review a sample of the affected staff and confirm that the new rates are available.

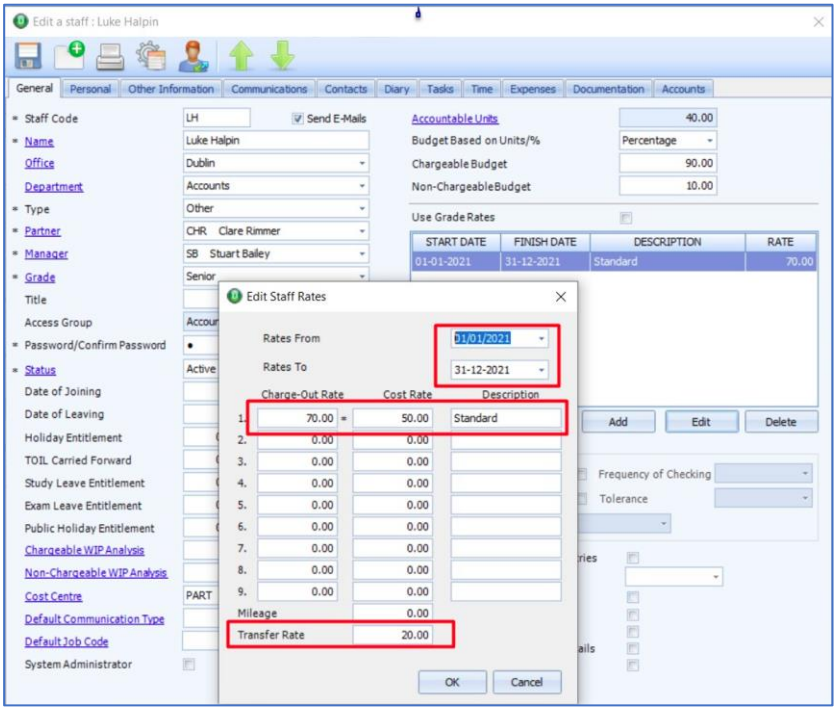


Figure: New Staff Rate imported

NOMINAL BUDGET

We have added a new feature to allow you to import your nominal accounts budget, from an excel spreadsheet.

To import the nominal budget, the logged in staff member must be given access to this new feature.

To give a staff member access to this new feature, you must go to **[Tools], [User Access Groups], [Access Functions], [Nominal Ledger]** and tick **'Import Nominal Budget'** checkbox.

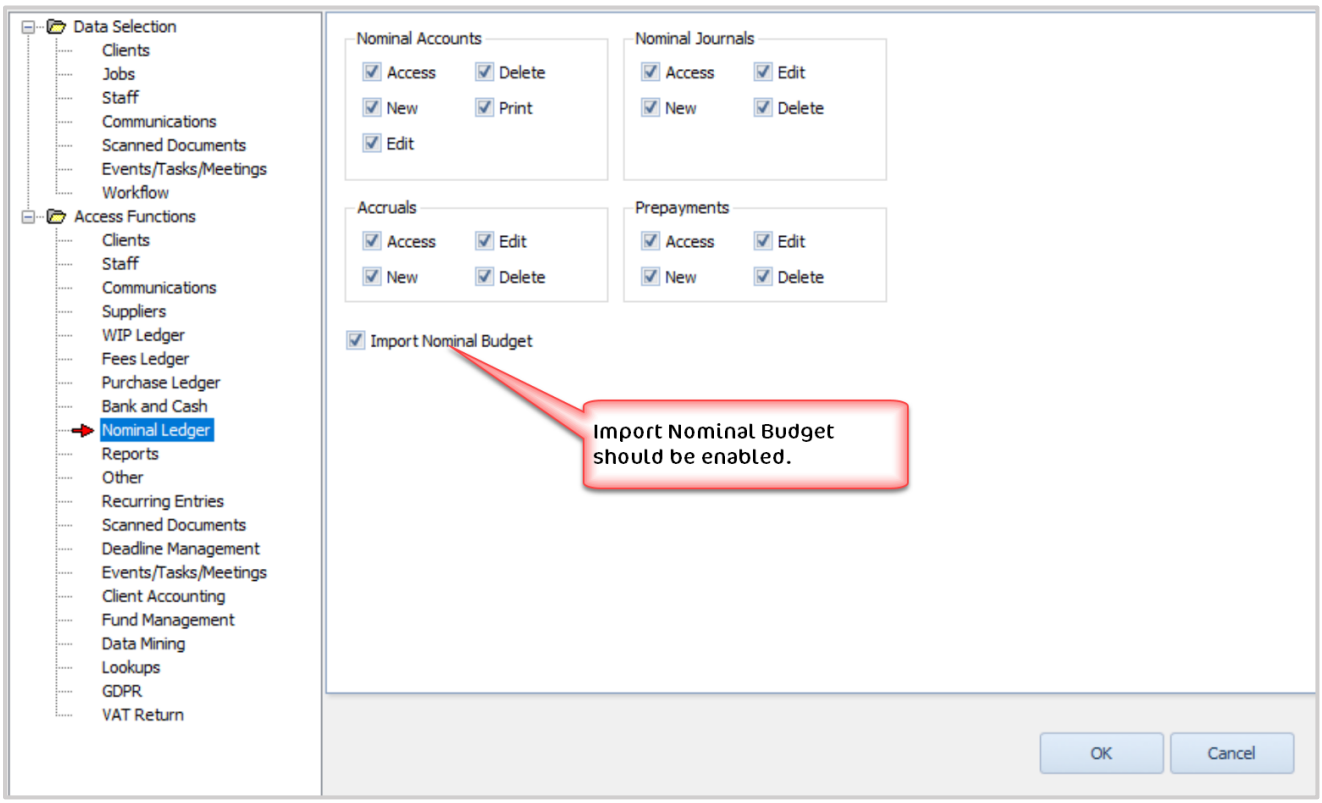


Figure: Option to enable Import Nominal Budget

From **[Nominal Ledger], [Nominal Accounts]**, you should now see an icon for **'Nominal Budget Import'** on the toolbar.

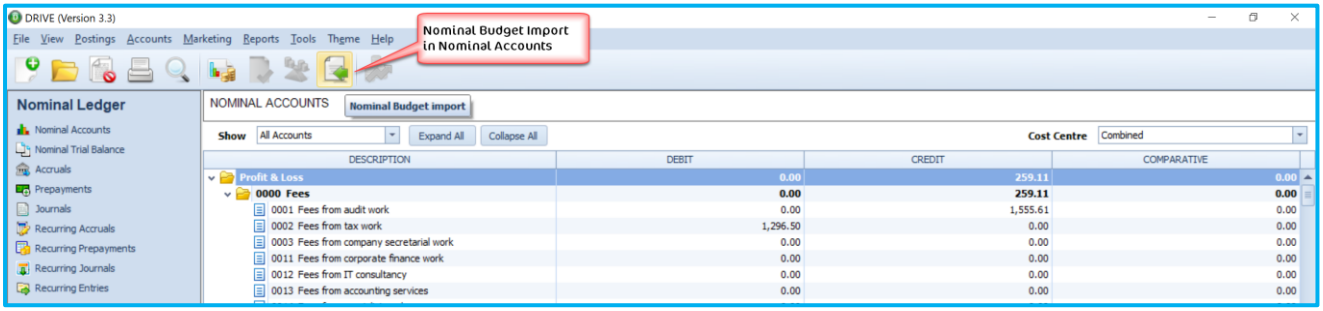


Figure: Nominal Budget Import icon

When you click the **'Nominal Budget Import'** icon, the following screen will sppear

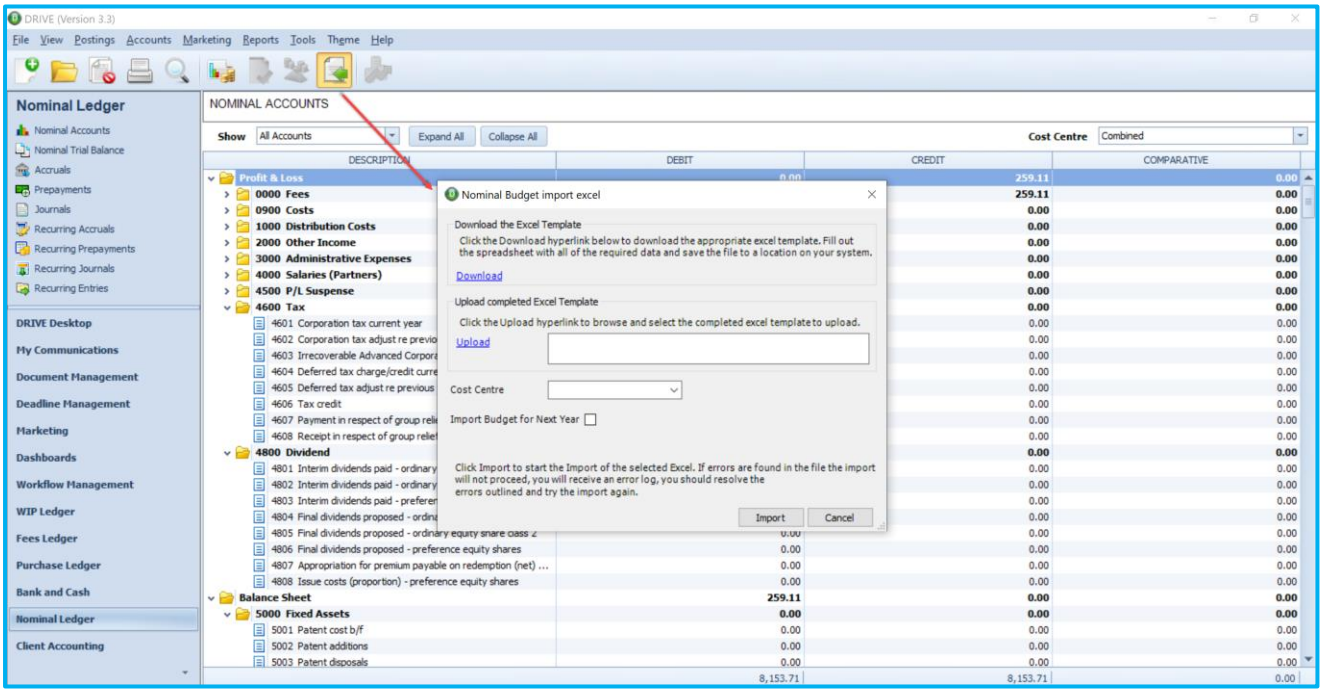


Figure: 'Nominal Budget Import' Excel window with Download and Upload options

First, use the **'Download'** hyperlink to download the excel, open the downloaded file and fill in the relevant details (making sure not to alter the excel columns/format) and once complete, save the file.

Next, click the **'Upload'** hyperlink, point to the location of the saved file and click 'Import'.

You will have options

a) to import the budget for this year or next year end and
b) to import into a specific cost centre, if applicable

CLIENTS, JOBS, STAFF, SUPPLIERS & BILLS

We have added a, previously internally used only, import routine to the system. This routine will allow you to import;

a) Clients (Prospects and Contacts) with a default Job
b) Clients (Prospects and Contacts) without any Job
c) Jobs
d) Staff
e) Suppliers
f) Bills

From excel templates.

To use the import routine, the logged in staff member must be given access to this new feature.

To give a staff member access to this new feature, you must go to **[Tools], [User Access Groups], [Access Functions], [Other]** and tick **'Import from Excel'** checkbox.

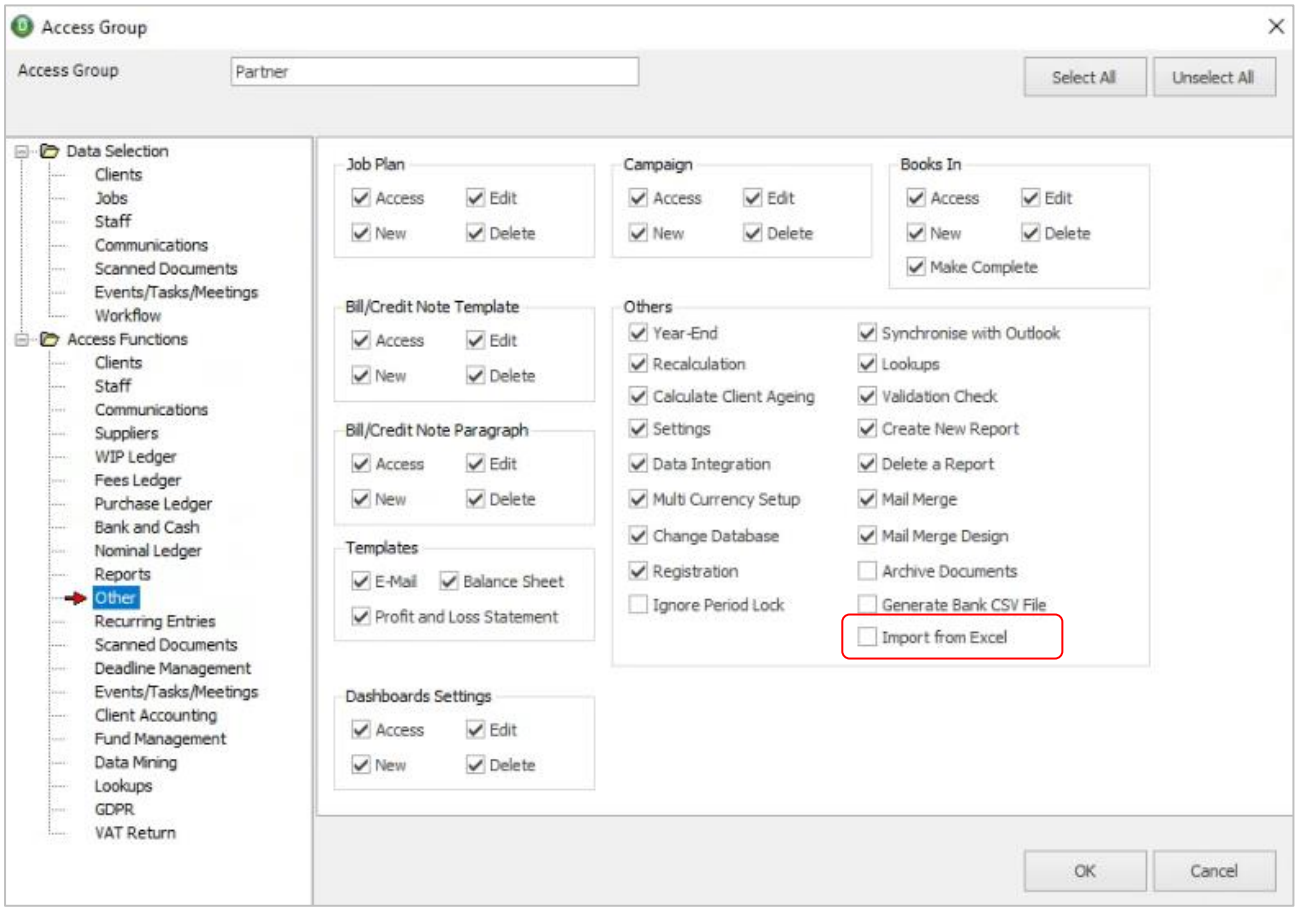
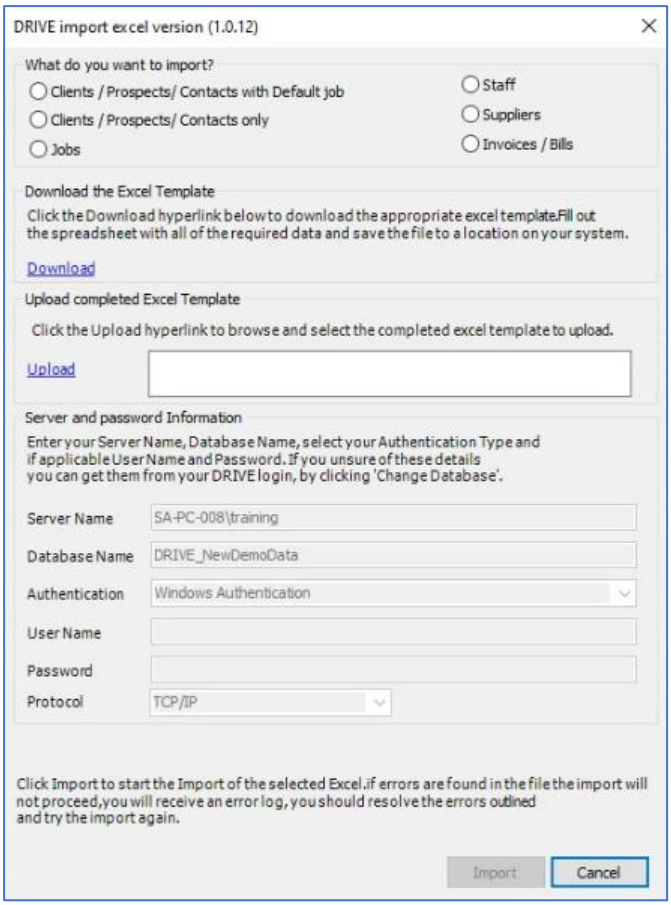


Figure: Option to enable 'Import from Excel' rights

NB: If you are importing a large volume of data, we recommend that you

a) Ask all users to logout
b) Take a backup your database
c) Do a trial run i.e. import a small number of records and confirm that the details are uploaded as expected
d) Allow enough time to import, check the import has been successful and, if necessary, Restore the database from the backup

To access the function, go to **[File], [Import], [Import from Excel]** and the following screen will appear



First, download the excel templates, using the **'Download'** hyperlink. Fill in the appropriate excel and save the file.

Next, upload the saved file using the **'Upload'** hyperlink and click **'Import'**.

Note: The Server, Database and User data will be prefilled with your details and will be NOT be editable but you should confirm that these are correct **BEFORE** you click 'Import'.

When the **Import** is complete, you will get a message saying that it was 'Successful'.

DIARY AND TASK ENTRY

We have added two new fields, '**Created Date'** and '**Time'** in the **[Add Diary/Task]** form

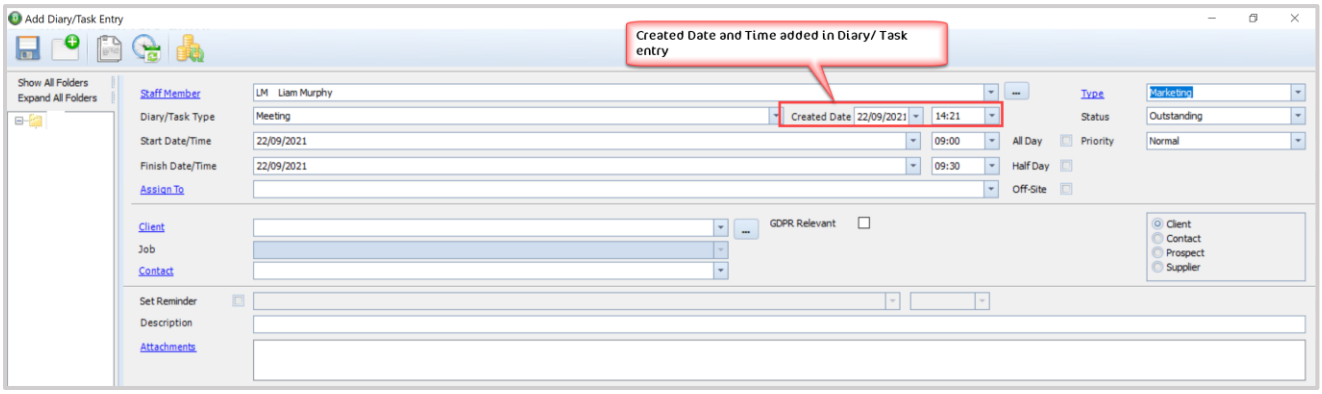


Figure: New fields for 'Created Date' and 'Time' in Add Diary/Task

REPORTS

CLIENT DEADLINE STATUS REPORT

We have added two new available columns, **'Staff Code'** and **'Staff'** (Name), to the Client Deadline Status Report.

To add these columns to the report, right-click and open the report, then go to '**Column Selection**' and Tick the **'Staff Code'** and/or **'Staff'** checkboxes.

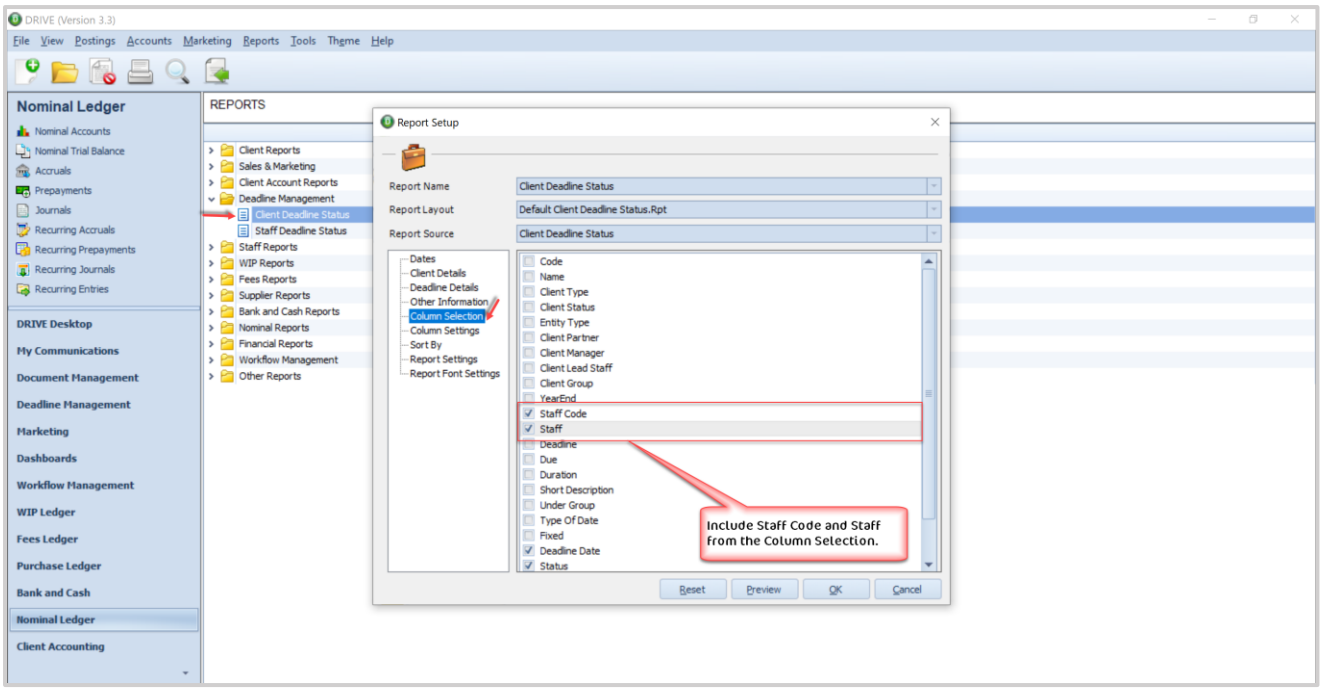
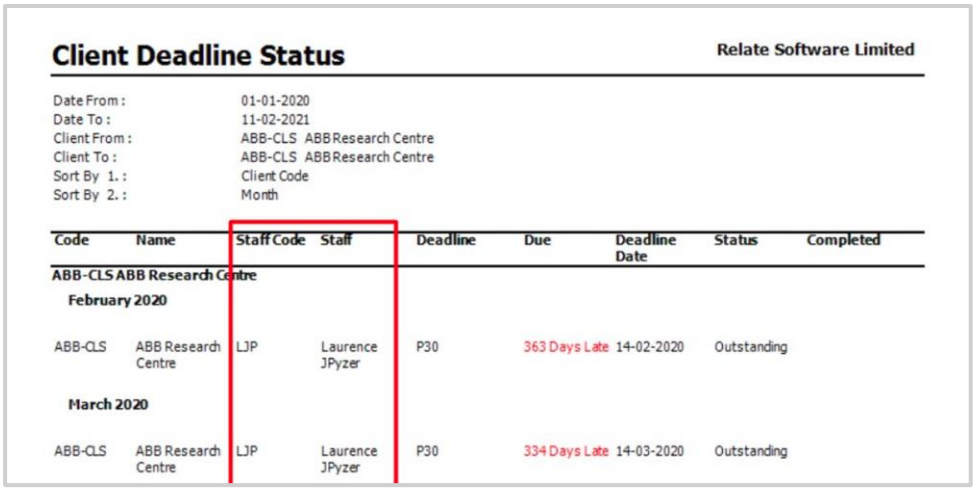


Figure: 'Staff Code' and 'Staff' (Name) - Available columns



Client Deadline Status — Relate Software Limited

Date From : 01-01-2020
Date To : 11-02-2021
Client From : ABB-CLS ABB Research Centre
Client To : ABB-CLS ABB Research Centre
Sort By 1. : Client Code
Sort By 2. : Month

Code	Name	Staff Code	Staff	Deadline	Due	Deadline Date	Status	Completed
ABB-CLS ABB Research Centre								
February 2020								
ABB-CLS	ABB Research Centre	LJP	Laurence JPyzer	P30	363 Days Late	14-02-2020	Outstanding	
March 2020								
ABB-CLS	ABB Research Centre	LJP	Laurence JPyzer	P30	334 Days Late	14-03-2020	Outstanding	

Figure: 'Staff Code' and 'Staff' columns in Client Deadline Status Report

JOB LISTING

We have added two new available columns, **'Last Quote Date'** and **'Last Quote Amount'**, to the Job Listing Report.

To add these columns to the report, right-click and open the report, then go to '**Column Selection'** and Tick the **'Last Quote Date'** and/or **'Last Quote Amount'** checkboxes.

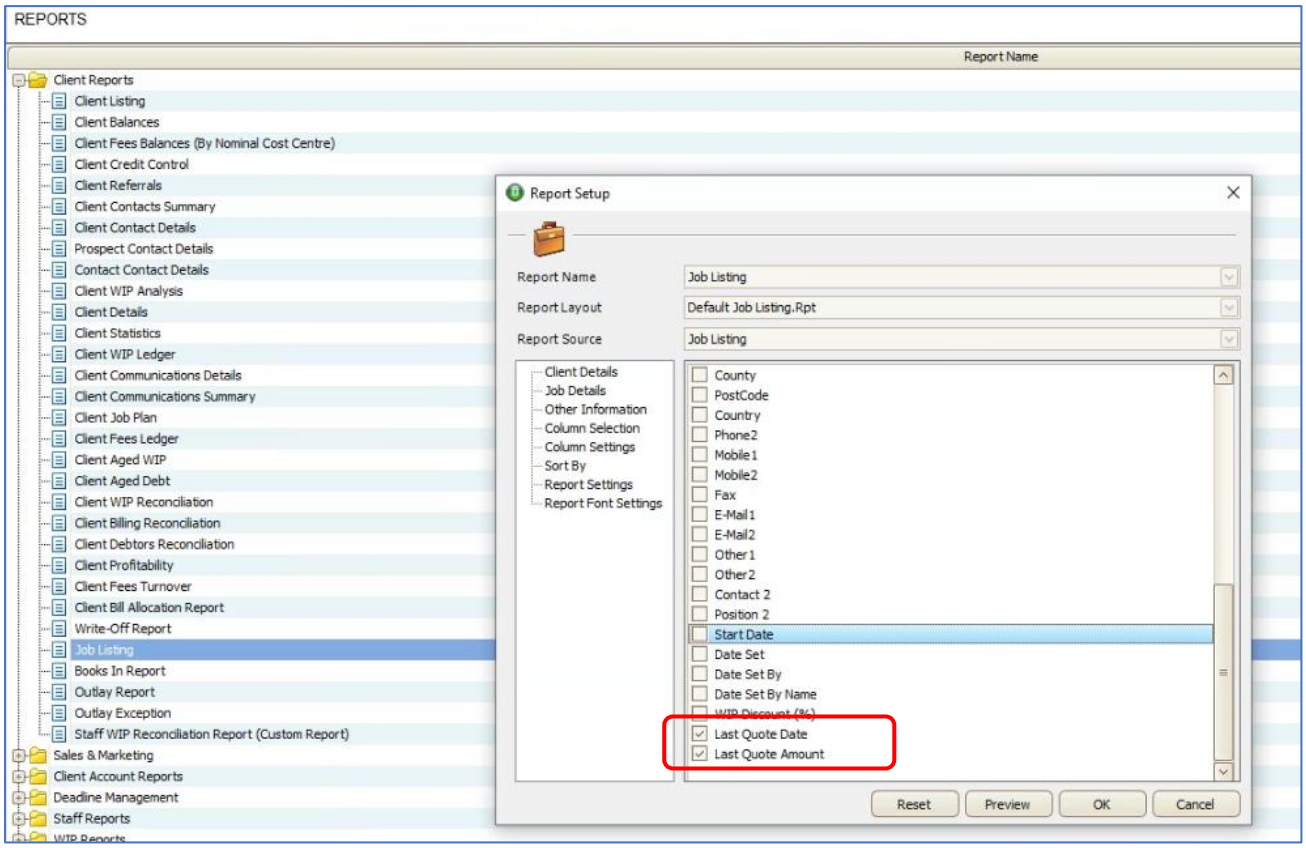


Figure: 'Last Quote Date' and 'Last Quote Amount' - Available columns

WEEKLY TIMESHEET SUMMARY REPORT, FILTER BY WIP ANALYSIS CODE

We have added a new filter option, **'WIP Analysis Code'** to the Weekly Timesheet Summary Report, with an option to include/exclude specific codes.

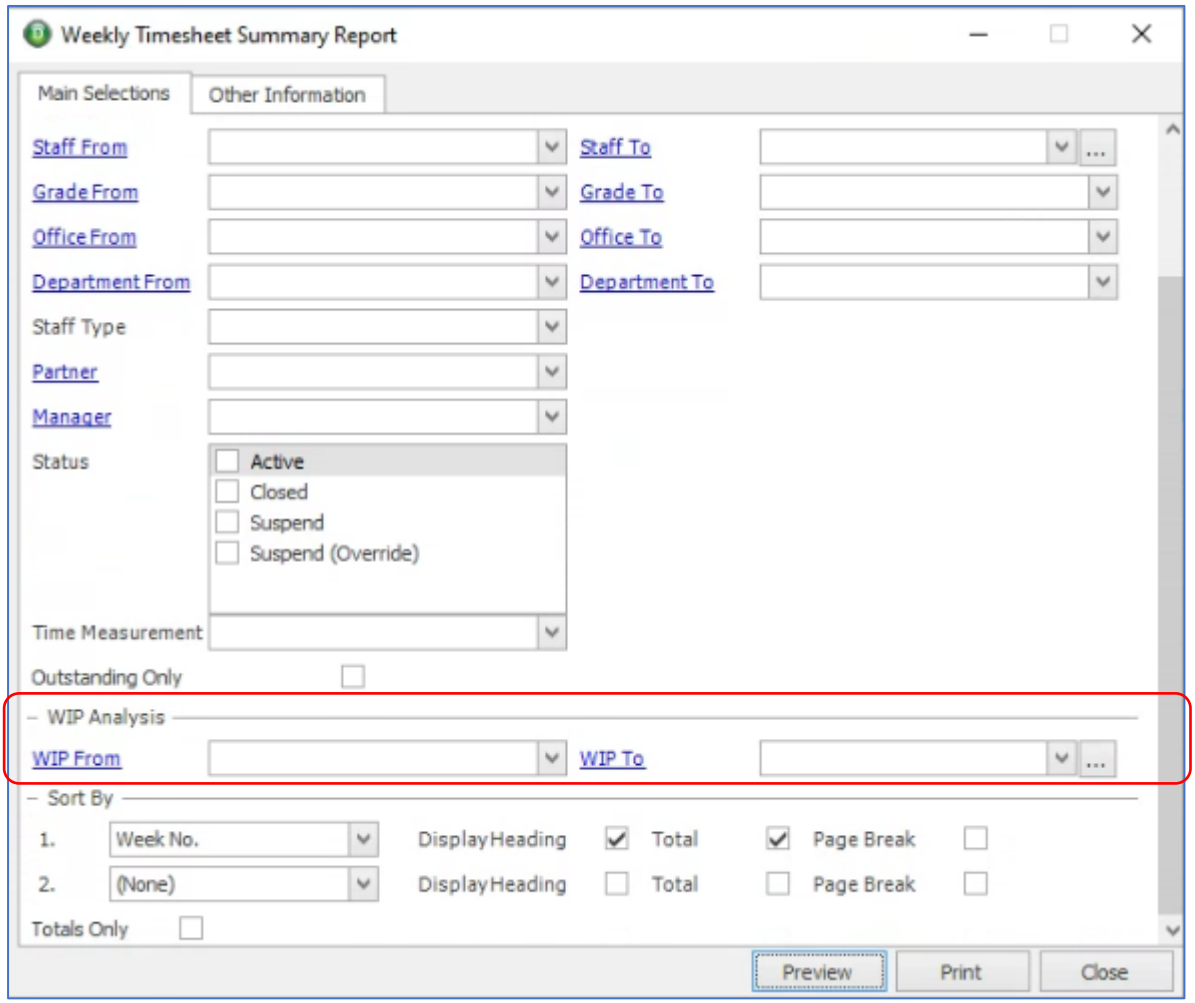
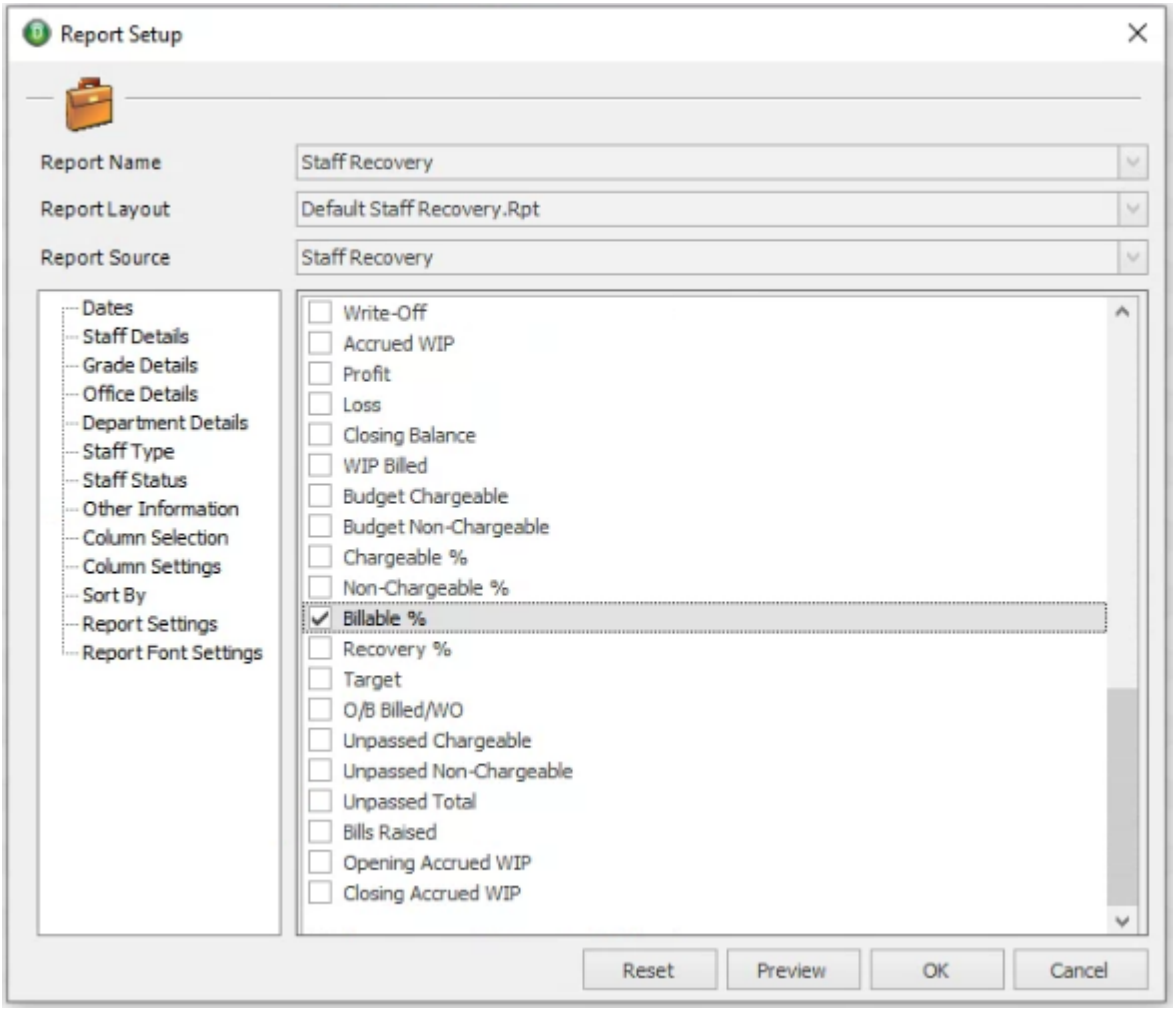


Figure: WIP Analysis 'From' and 'To' fields + optional include/exclude specific codes

STAFF RECOVERY REPORT, NEW 'BILLABLE %' CALCULATION COLUMN

We have added a new available column, **'Billable %'**, to the Staff Recovery Report. This % is calculated as follows: Chargeable Units/(Units Worked - Non-Chargeable/Non-Productive Units) *100. This figure represents chargeable time + non-chargeable productive time i.e. it only excludes Official Leave.

To add this column to the report, right-click and open the report, then go to '**Column Selection'** and Tick the **'Billable %'** checkbox.



TIMESHEET

NEW COPY TIMESHEET OPTION

In the Timesheet browse, we have added an option to copy the timesheet. On the toolbar of the Timesheet browse the '**Copy Timesheet'** icon has been added.

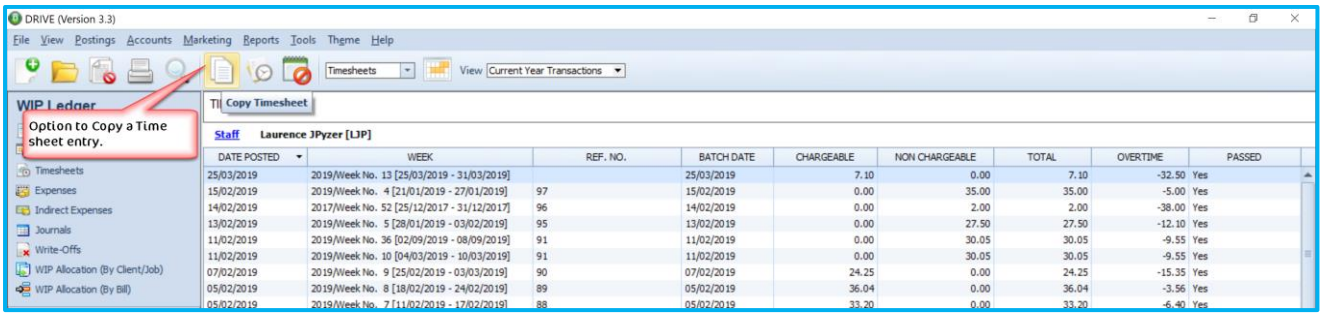


Figure: 'Copy Timesheet' option in Timesheet browse

Select the timesheet that you want to copy and click the **'Copy Timesheet'** option. The new timesheet will be open, you will need to select the appropriate **'Week No.'** to be created with the same details as this timesheet.

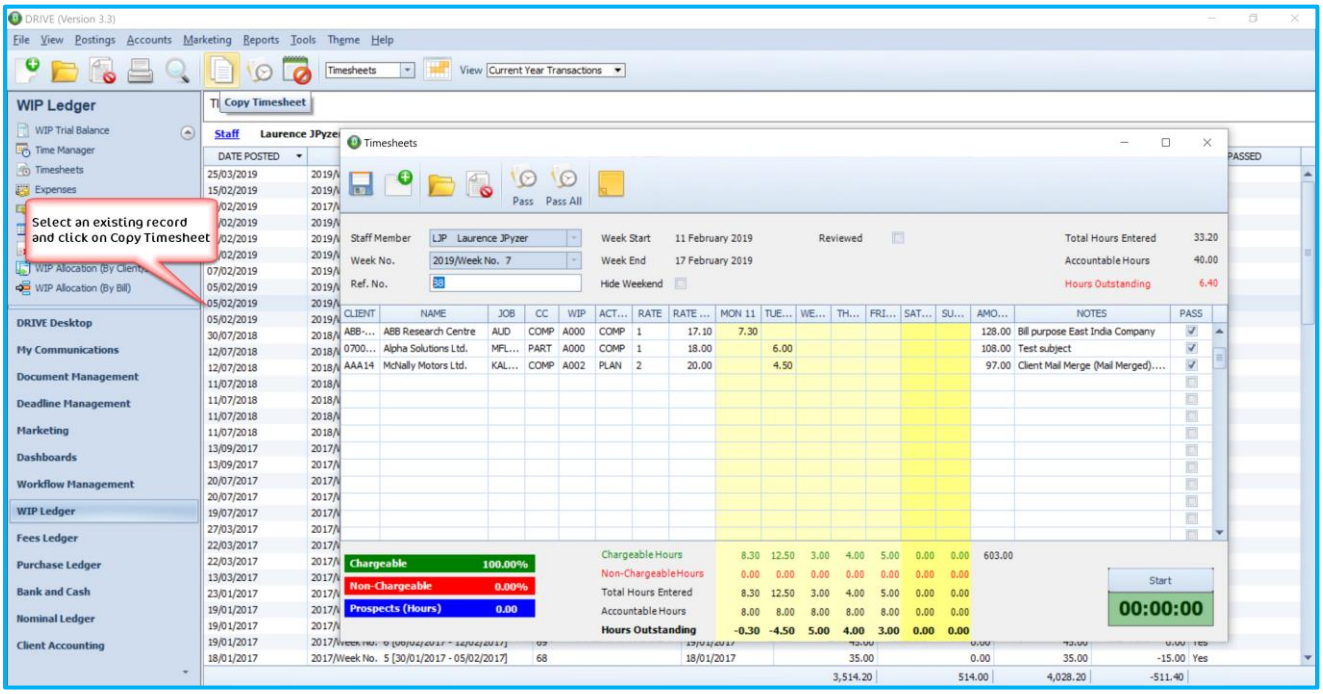
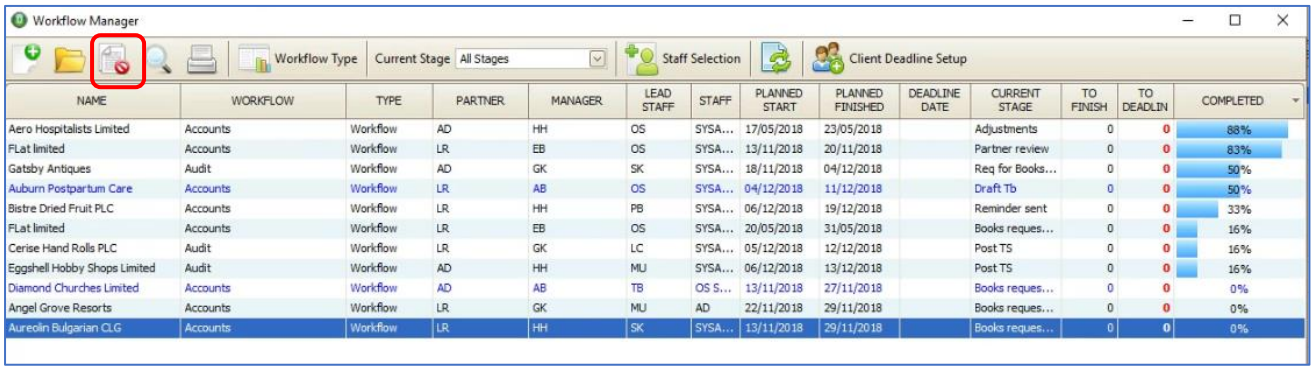


Figure: Copied Timesheet

WORKFLOW MANAGER

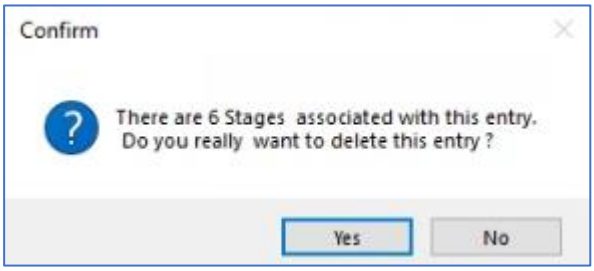
DELETE OPTION

We have added a delete icon to the **[Workflow Manager]** toolbar. Highlight/select the workflow which you wish to delete and then click the **'Delete'** icon.



NAME	WORKFLOW	TYPE	PARTNER	MANAGER	LEAD STAFF	STAFF	PLANNED START	PLANNED FINISHED	DEADLINE DATE	CURRENT STAGE	TO FINISH	TO DEADLIN	COMPLETED
Aero Hospitalists Limited	Accounts	Workflow	AD	HH	OS	SYSA...	17/05/2018	23/05/2018		Adjustments	0	0	88%
FLat limited	Accounts	Workflow	LR	EB	OS	SYSA...	13/11/2018	20/11/2018		Partner review	0	0	83%
Gatsby Antiques	Audit	Workflow	AD	GK	SK	SYSA...	18/11/2018	04/12/2018		Req for Books...	0	0	50%
Auburn Postpartum Care	Accounts	Workflow	LR	AB	OS	SYSA...	04/12/2018	11/12/2018		Draft Tb	0	0	50%
Bistre Dried Fruit PLC	Accounts	Workflow	LR	HH	PB	SYSA...	06/12/2018	19/12/2018		Reminder sent	0	0	33%
FLat limited	Accounts	Workflow	LR	EB	OS	SYSA...	20/05/2018	31/05/2018		Books reques...	0	0	16%
Cerise Hand Rolls PLC	Audit	Workflow	LR	GK	LC	SYSA...	05/12/2018	12/12/2018		Post TS	0	0	16%
Eggshell Hobby Shops Limited	Audit	Workflow	AD	HH	MU	SYSA...	06/12/2018	13/12/2018		Post TS	0	0	16%
Diamond Churches Limited	Accounts	Workflow	AD	AB	TB	OS S...	13/11/2018	27/11/2018		Books reques...	0	0	0%
Angel Grove Resorts	Accounts	Workflow	LR	GK	MU	AD	22/11/2018	29/11/2018		Books reques...	0	0	0%
Aureolin Bulgarian CLG	Accounts	Workflow	LR	HH	SK	SYSA...	13/11/2018	29/11/2018		Books reques...	0	0	0%

You will get a confirmation message, like below



If you click **'Yes'** to confirm then this specific workflow will be deleted, you can cancel the deletion by clicking **'No'**.

Note: Only workflows with stages will mention the number of stages that will be deleted in the confirmation message.

STATEMENTS

INCLUDE/EXCLUDE DRAFT BILLS

We have introduced a new option on all 4 of the Statement Reports, which will allow you to optionally include draft bills.

You can also select which stage of draft you wish to include e.g. Draft, Reviewed, Approved or Signed off. Application of this will depend on the levels of draft which you have setup in **[Tools], [Settings], [Fees Ledger], [Draft Billing Setup]**.

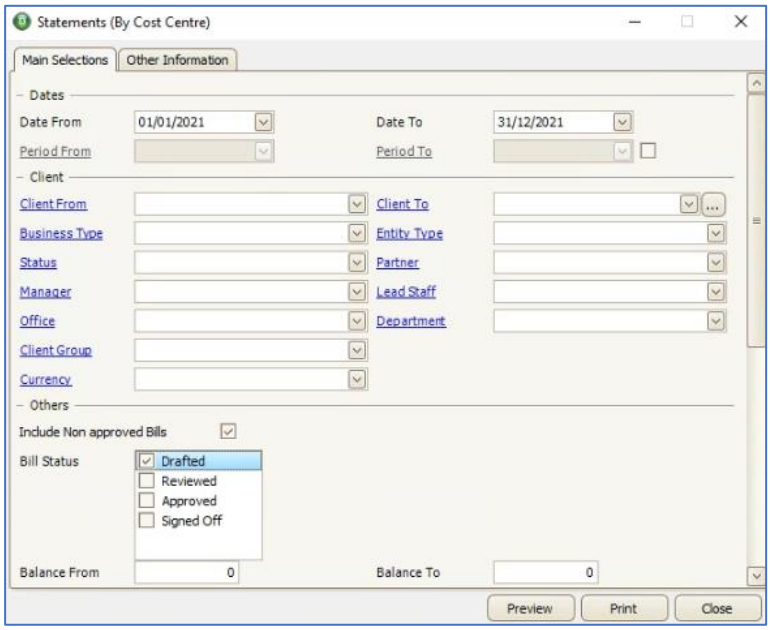


Figure: Bill Status options to Include on the Statement

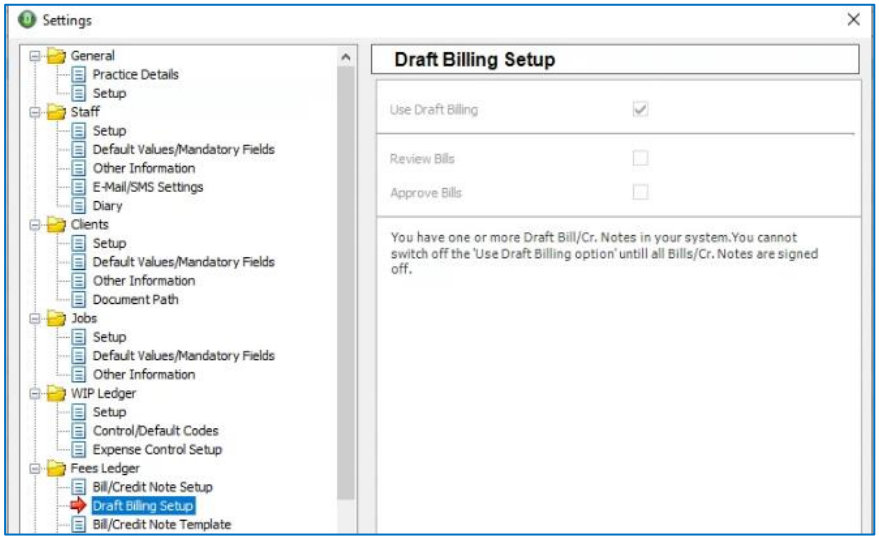


Figure: Draft Bill Setup

DEADLINE DATE CHANGE

IRELAND, ANNUAL RETURN DATE DUE – 56 DAYS

The **Company Secretary Annual Return Deadline Due Date** has been updated to **56 days from Annual Return Date**, in line with the statutory/regulatory changes.

Please note where you have already generated several years of deadlines, you will need to delete the future ones and re-generate them.

To do this, go to **[Deadline Management], [Client Deadline Diary]**, then select the client and delete the next/future deadlines, where deadline dates are now incorrect.

Figure: Deadline Management, Client Deadline Diary

Then go to **[Client & Contact database]**, highlight the client and click the **'Client Deadline Date'** icon from the menu, check the details, if details are correct then click **'OK'**.

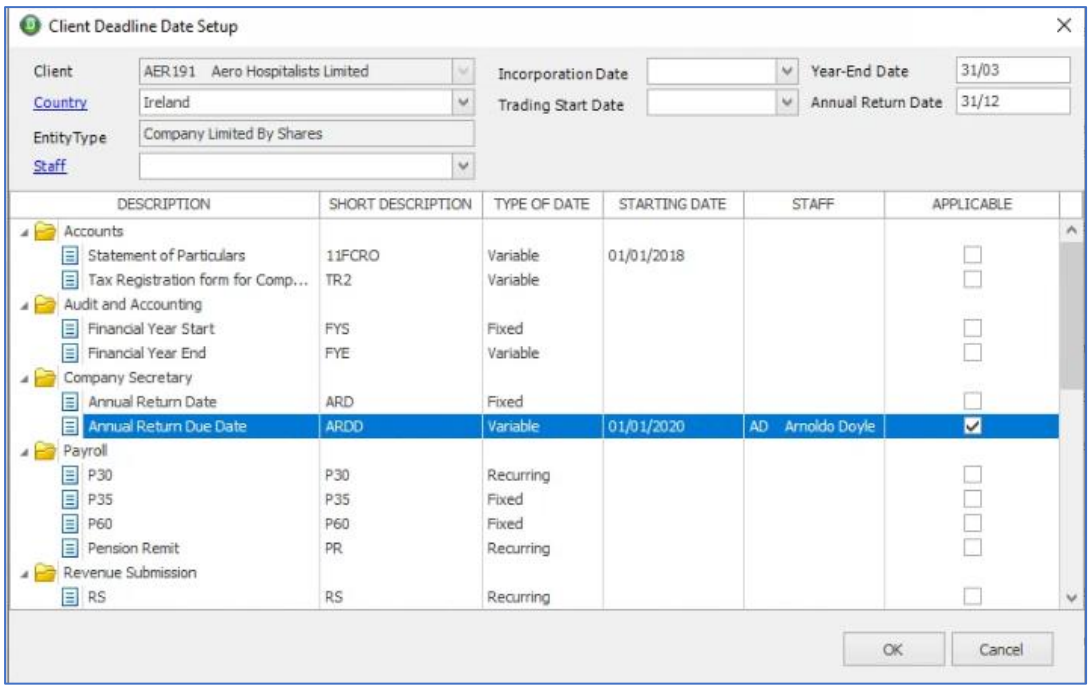


Figure: Client Deadline Date Setup

New deadlines will be generated for that client. Repeat this process for each client for which you make company secretary annual returns.

Please also note, there is no change to UK Confirmation Statement Due Dates.

WEB LINKS

USERS DEFAULT BROWSER WILL NOW BE USED

In this release your system default web browser will be used to open any web links which you click on, e.g. if you have Microsoft Edge as your default browser then that is the application that will open when you click on a web link.

PULL CLIENT DATA FROM THE COMPANIES REGISTRATION OFFICE

WHEN ADDING CLIENTS, OPTION TO PULL DATA FROM THE CRO

When adding clients, you can now optionally pull some basic company information directly from the Companies Registration Office.

From the **[Add Client Details]** form, enter the business name and then click the **'CRO'** button

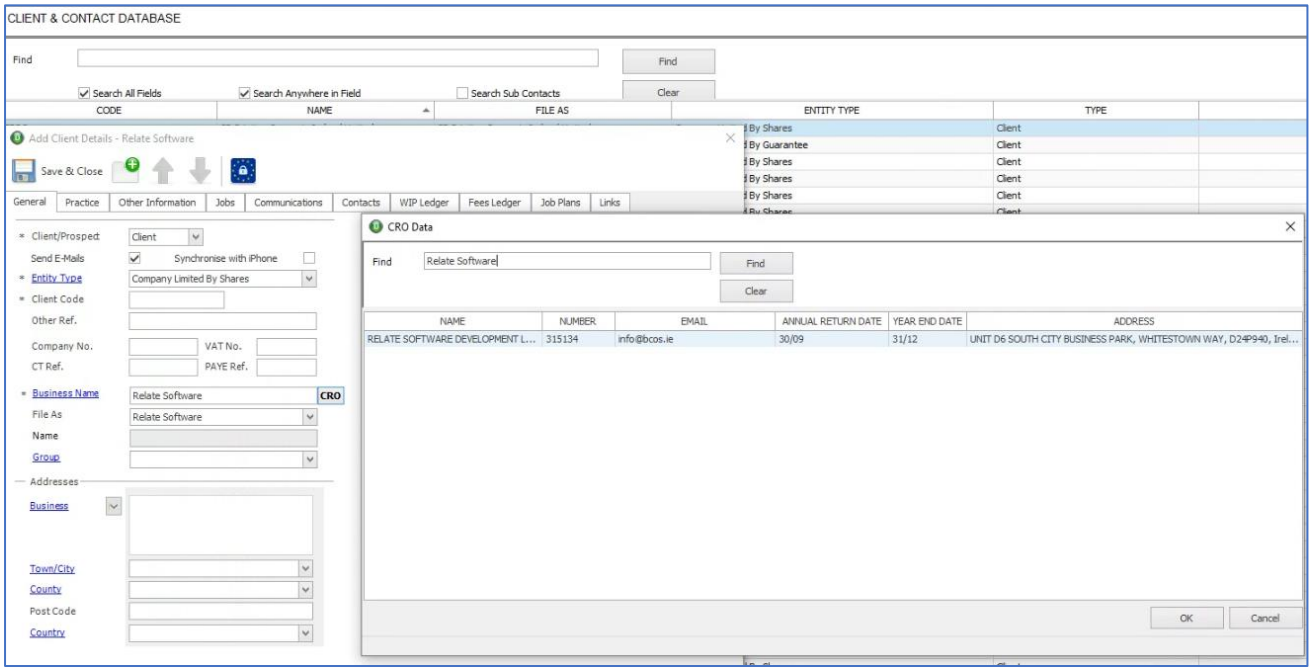


Figure: Client Selection from CRO Database

The **[CRO Data]** form will appear, with the business name which you have entered in the 'Find' field

Click the **'Find'** button, a list of business with the name entered will appear

The following company details will appear

- Full Name
- Company Number
- Contact email address
- Annual Return Date
- Year End Date
- Address

Where several business with a similar name appear, select the appropriate business by highlighting/clicking on the correct one and then click **'OK'**.

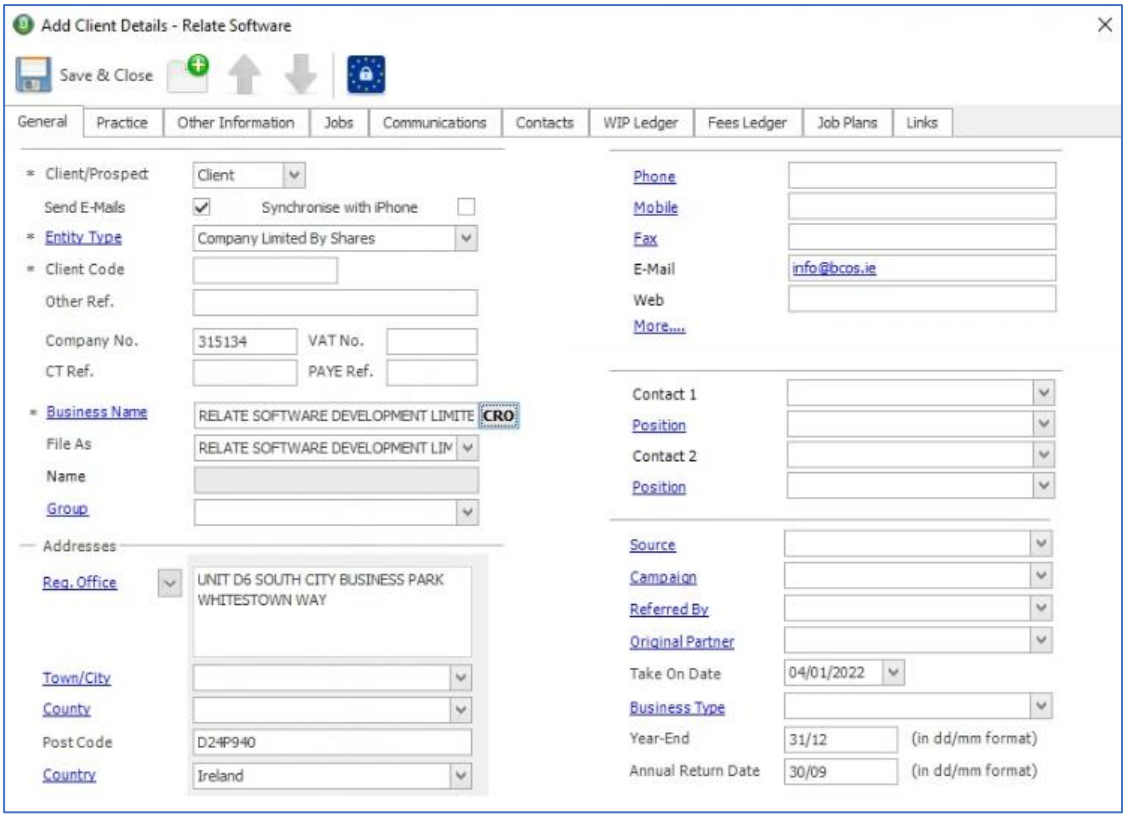


Figure: CRO data pulled into Add Client Details Form

The appropriate fields on the **[Add Client Details]** form will be populated with data from the CRO.

Note: The Details pulled from the CRO are normally all in UPPERCASE.

WIP LEDGER

CURRENCY COLUMN (IF APPLICABLE)

If your database is setup for Multi-currency, you will now be able to display your client's WIP Ledger entries in both that client's currency and the base currency, see £ column below. This was previousy only an option in the Fees Ledger.

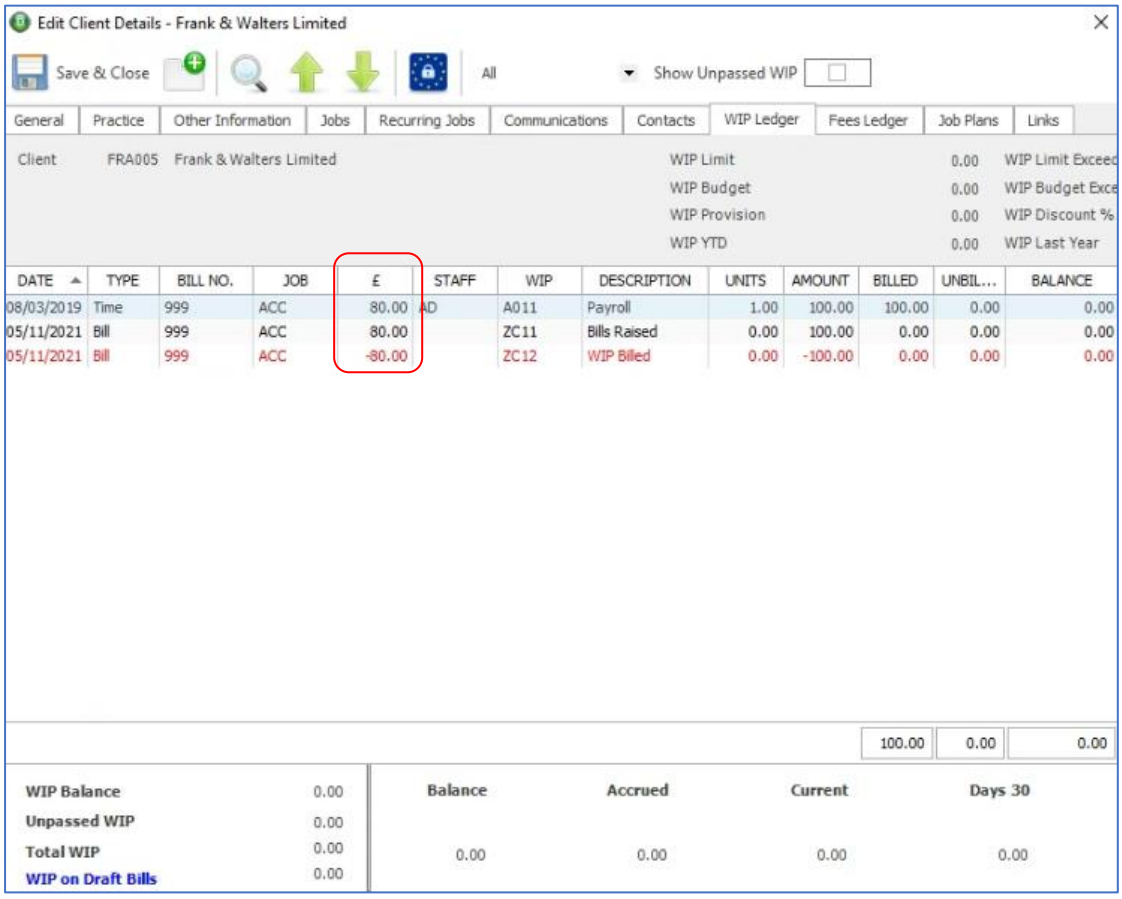


Figure: WIP Ledger with Client Currency Column displayed

CLIENT/ JOB SPECIFIC CHARGE-OUT RATE

We have introduced a new charge-out rate for a job, this job rate will supersede the rate selected for the staff member.

To enter the agreed rate, open the relevant job, select the **'Practice'** tab and enter the per hour amount in the **'Agreed Charge-out Rate'** field.

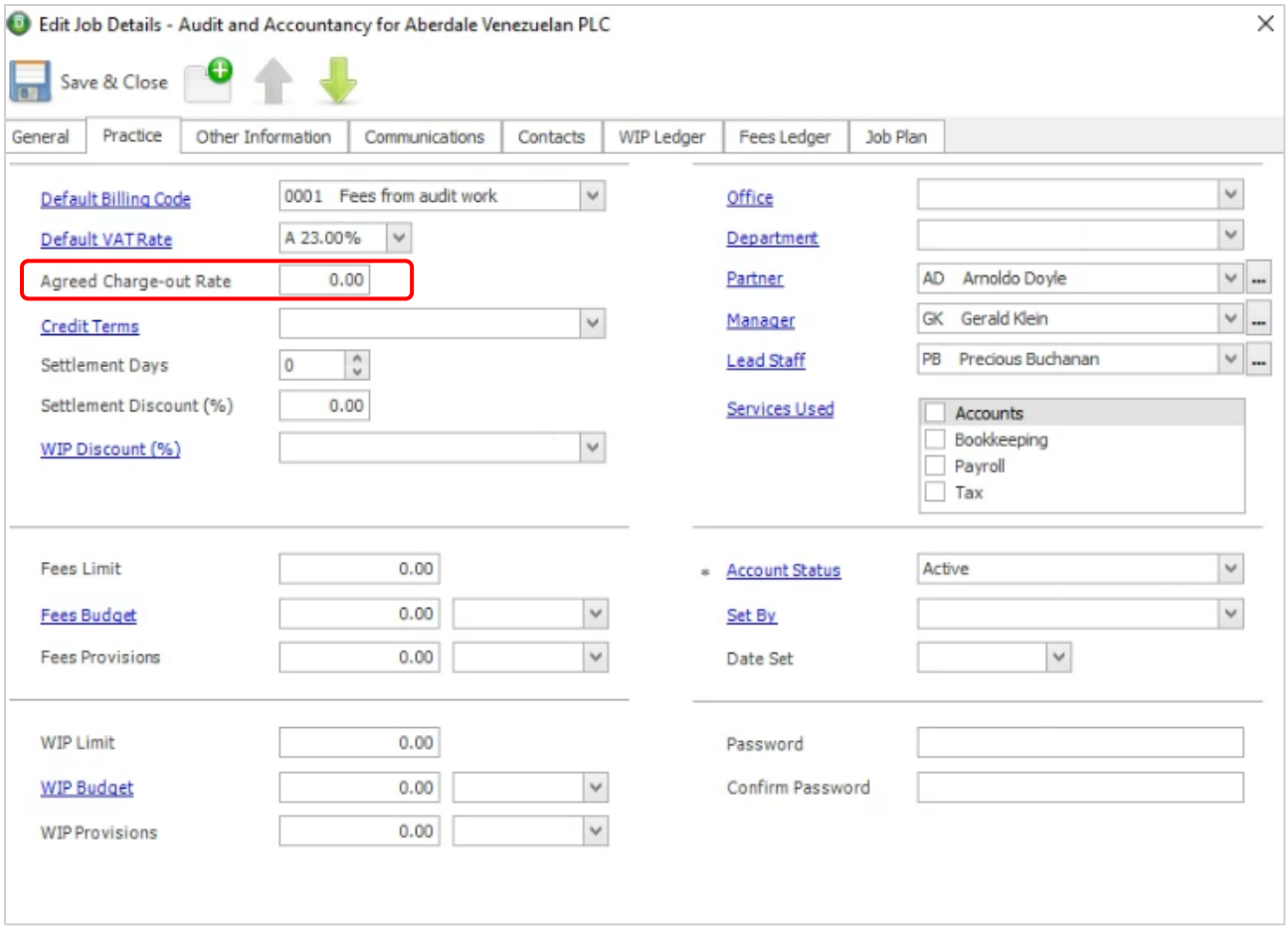


Figure: Job, Practice tab, 'Agreed Charge-out Rate'

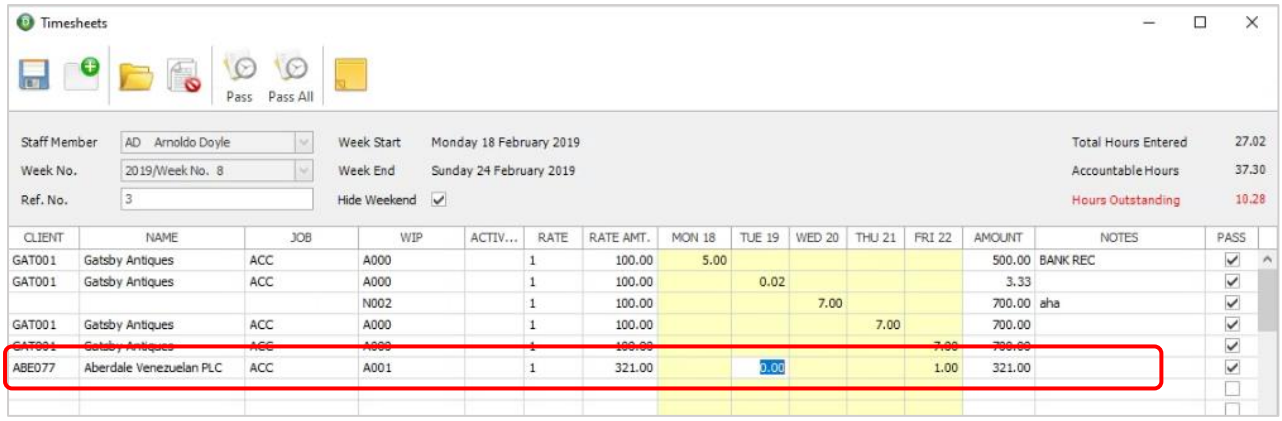


Figure: Timesheets, 'Job Charge-out Rate'

MERGE CLIENT

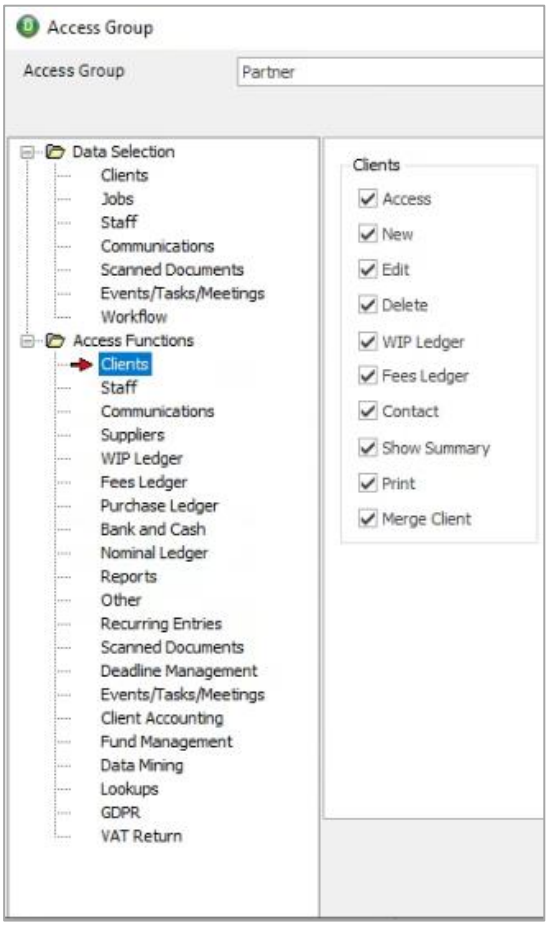
We have introduced a new option to merge Client data. The Data that is merged includes;

a) Fees Ledger Transactions (along with allocations & discounts)
b) WIP Ledger Transactions (along with allocations)
c) Communications

Recommended: After merging client data we recommend that you run a recalculation, **[Tools], [Recalculation], [Full Recalculation].**

To Merge Client Data, the logged in staff member must be given access to this new feature.

To give a staff member access to this new feature, you must go to **[Tools], [User Access Groups], [Access Functions], [Clients]** and tick **'Merge Client'** checkbox.



To merge client data, go to the **[Client & Contact Database]**, highlight the client that you want to Merge 'From', right click (the menu below should appear) and select **'Merge Client'**

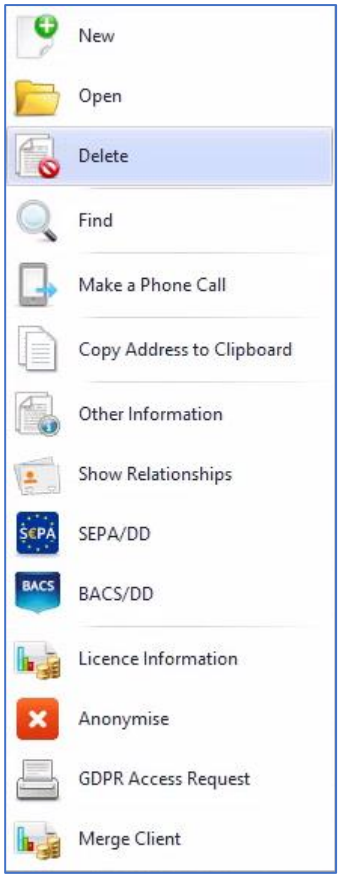
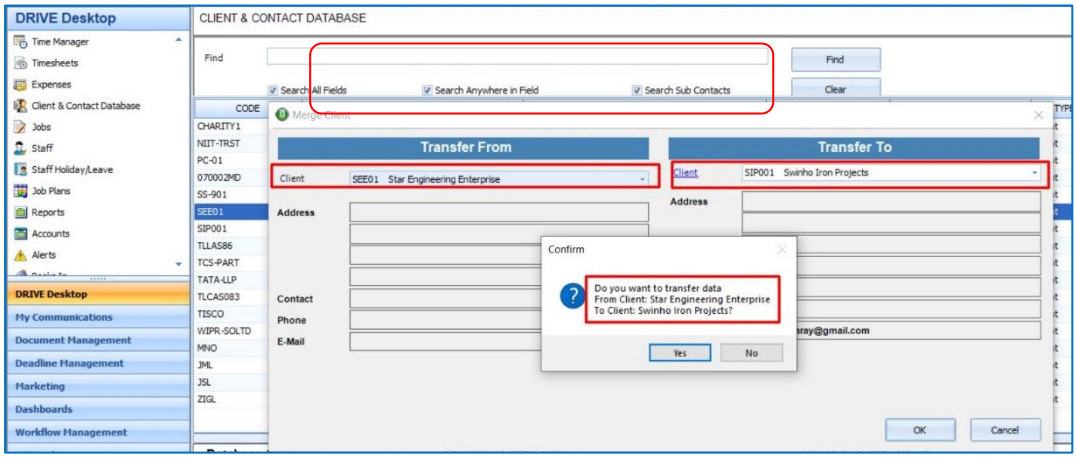


Figure: Right Click Menu, 'Merge Client'

The following screen should appear



Next, enter the Client, that you wish to merge with in the '**Transfer To**' Client field

Click '**OK'** to commence '**Merge'**, you will receive a confirmation mesage