

RELEASE NOTES

for DRIVE



Version 3.3 Build 2

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software

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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 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.



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.

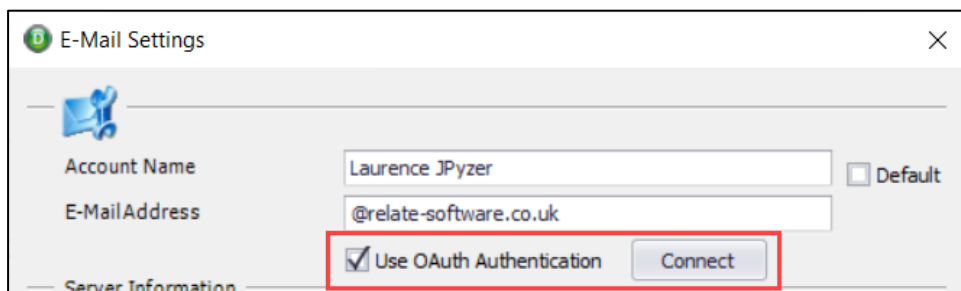


Figure: the 'Use OAuth Authentication' checkbox

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

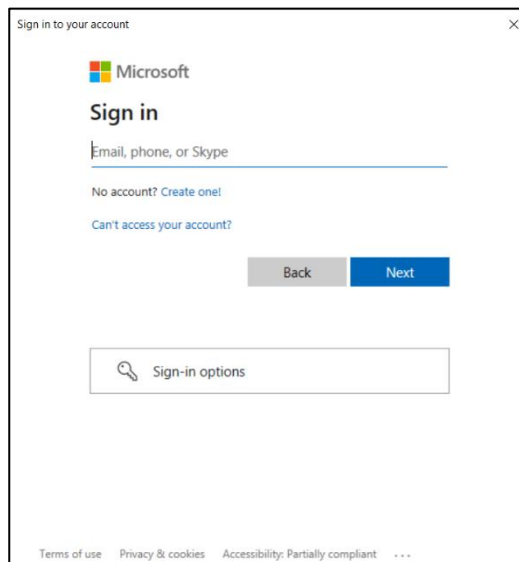


Figure: The Microsoft Login Form



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.

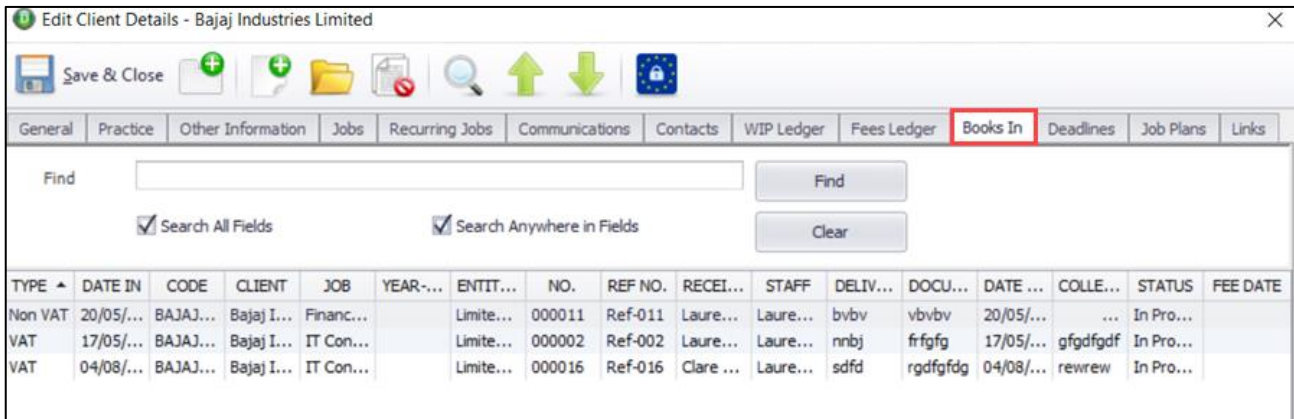


Figure: Books In tab in Client Details

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.

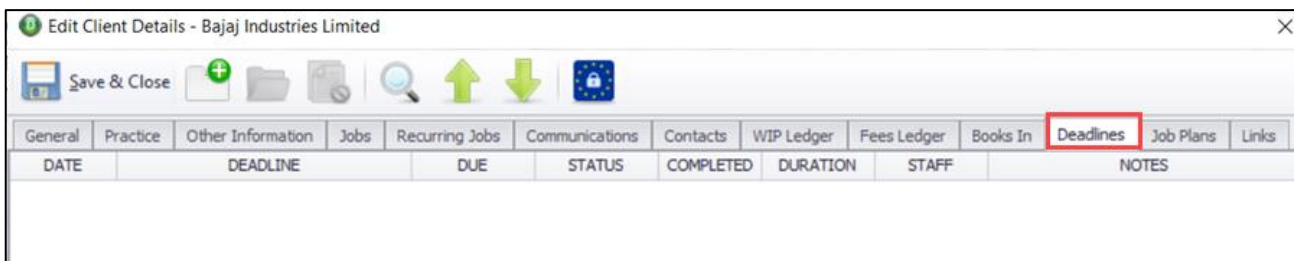


Figure: Deadlines Tab in Client Details



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.

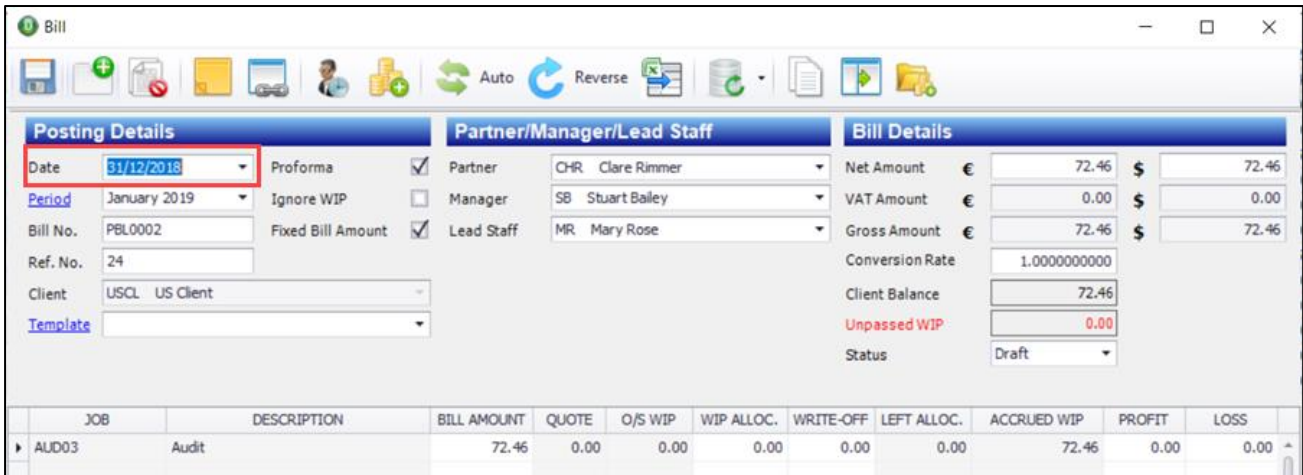


Figure: Transaction Date prior to Period Start Date

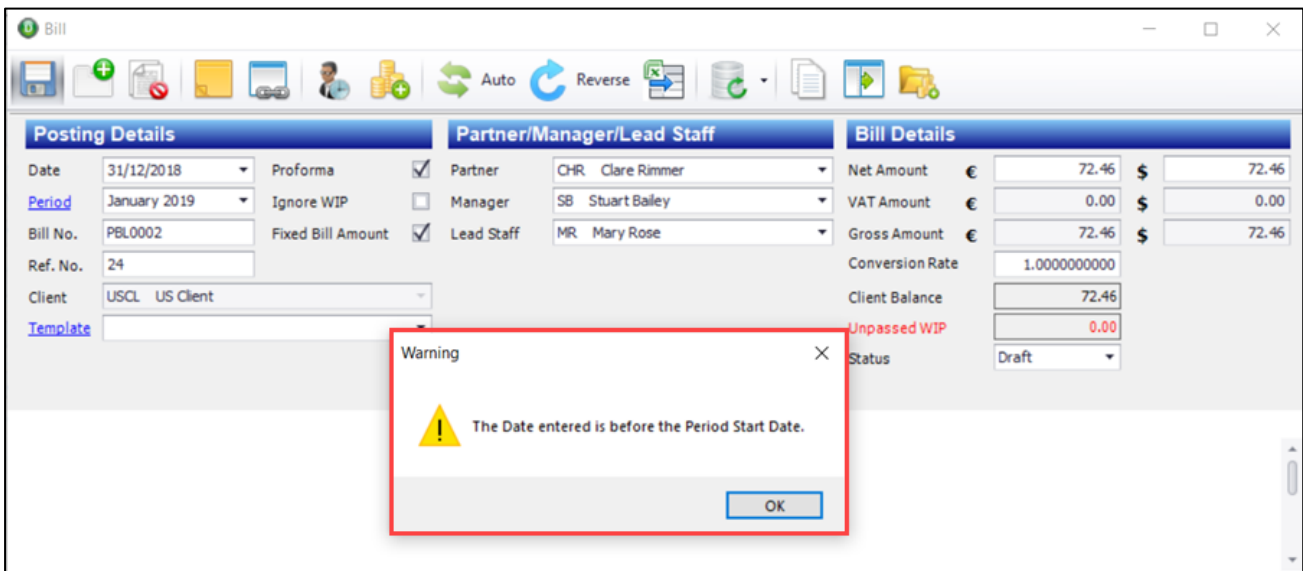


Figure: Warning Message



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**].

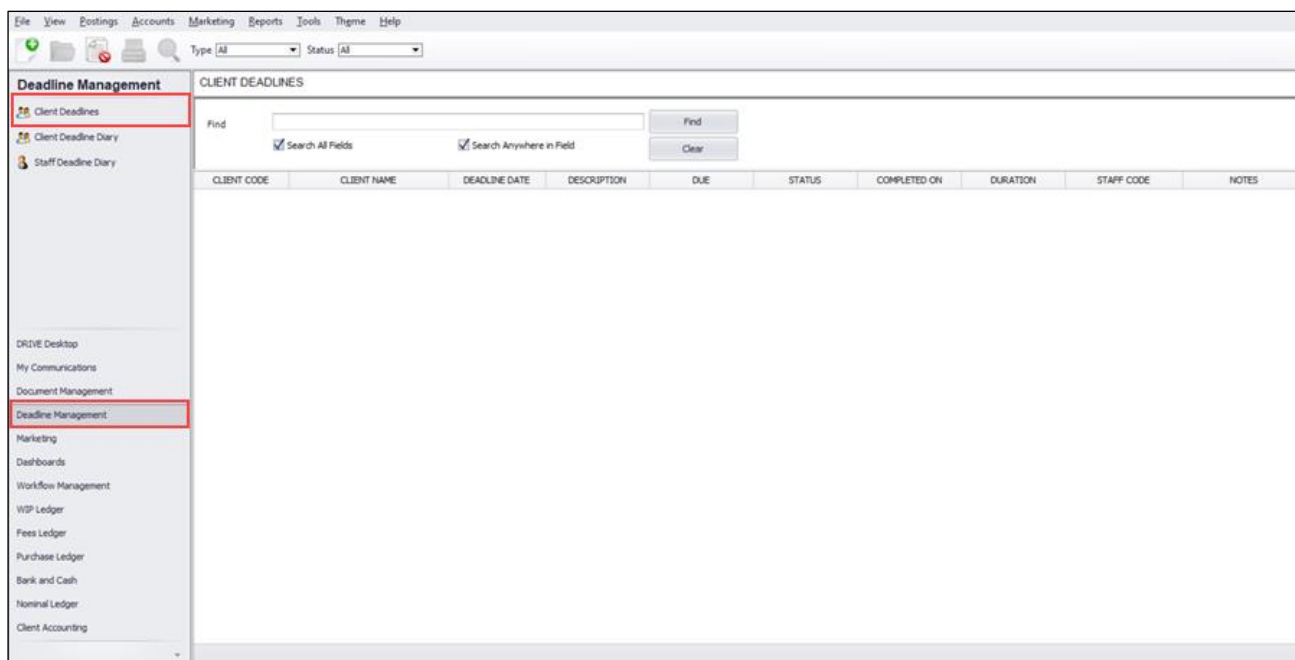


Figure: Client Deadlines Browse



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**].



Figure: Tools - Export Clients and Services to Accountancy Manager

Click [OK] to begin the export.

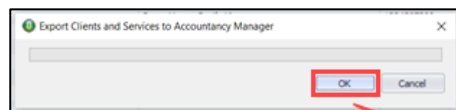


Figure: Clients and Services Data Export Begins

A progress bar will then be displayed.

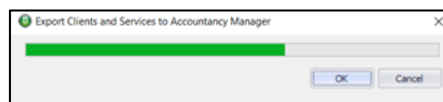


Figure: Data Export in Progress



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

STAFF & PARTNER USERS		BUSINESS DETAILS			ACCOUNTING SYSTEM				
Staff User Responsible	Partner	Client Name	Trading As	Nature of Business	Client Type	Date of Trading	Accounts Production Software	Company No	Company UTR
Susan Edwards	Clare Rimmer	Alpha Solutions Ltd.	Alpha Solutions Ltd.		Irish Company Limited By Shares				
Clare Rimmer		McMahon Associates	McMahon Associates		Irish Partnership				
Stuart Bailey	Richie M McMahon	Somani Suppliers Ltd.	Somani Suppliers Ltd.		Irish Company Limited By Shares				
Stuart Bailey		Bruhan Motors	Bruhan Motors		Irish Company Limited By Shares				
Susan Edwards		McNally Motors Ltd.	McNally Motors Ltd.		Irish Company Limited By Shares				
Susan Edwards	Laurence JPyzer	ABB Research Centre	Centre, ABB Research	Hospital Trust	Irish Company Limited By Shares				
Susan Edwards	Richie M McMahon	ABC Corporation Limited	Limited, ABC Corporation		Irish Company Limited By Shares				
Stuart Bailey	Raymond Rogers	Bajaj Industries Limited	Bajaj Industries Limited	Zoological Gardens	Irish Limited Liability Partnership			TTK	ERY
Jayanta Guharay		Child Client-1	Child Client-1		Irish Company Limited By Shares				
Clare Rimmer		Child Client-2	Child Client-2		Irish Company Limited By Shares				
Jayanta Guharay		New Contact-1	New Contact-1		Irish Charity				
Jayanta Guharay	Raymond Rogers	COSEC Client Limited	COSEC Client Limited		Irish Company Limited By Shares				
		Guharay Associates	Guharay Associates		Irish Company Limited By Shares				
Stuart Bailey	Clare Rimmer	G. D. Pharmaceuticals Ltd.	G. D. Pharmaceuticals Ltd.	Accountant	Irish Company Limited By Shares			12345	
Susan Edwards	Clare Rimmer	Jupitar Cooling Towers	Jupitar Cooling Towers		Irish Company Limited By Shares				
Stuart Bailey	Laurence JPyzer	Jigma Motors Limited	Jigma Motors Limited		Irish Company Limited By Shares				
Jayanta Guharay		Jupitar Trading Company	Jupitar Trading Company		Irish Company Limited By Shares				
Clare Rimmer		L & T Infotech	L & T Infotech	Accountant	Irish Company Limited By Guarantee				
		Moriss Food Products Ltd.	Moriss Food Products Ltd.		Irish Company Limited By Shares				
Susan Edwards		NIIT Technologies Limited	NIIT Technologies Limited		Irish Individual				
Stuart Bailey		Parent Client	Parent Client		Irish Company Limited By Shares				
		Sukumar Chatterjee	Sukumar Chatterjee		Irish Company Limited By Shares				
Jayanta Guharay		Tata Industries Limited	Tata Industries Limited	Agriculture	Irish Limited Liability Partnership				
Stuart Bailey		Tata Consultancy Limited	Tata Consultancy Limited		Irish Partnership				
Stuart Bailey	Laurence JPyzer	TISCO India Ltd.	TISCO India Ltd.		Irish Limited Liability Partnership				
Stuart Bailey	Clare Rimmer	Test School	Test School		Irish School				

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]**.

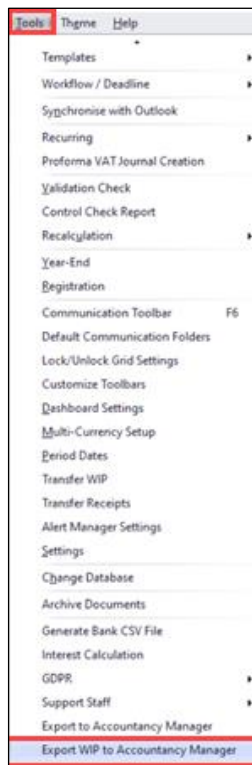


Figure: Tools - Export WIP to Accountancy Manager



Click [OK] to begin the export.

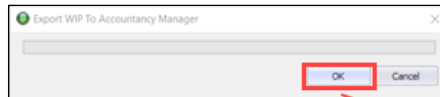


Figure: WIP Export begins

A progress bar will then be displayed.

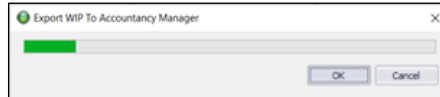
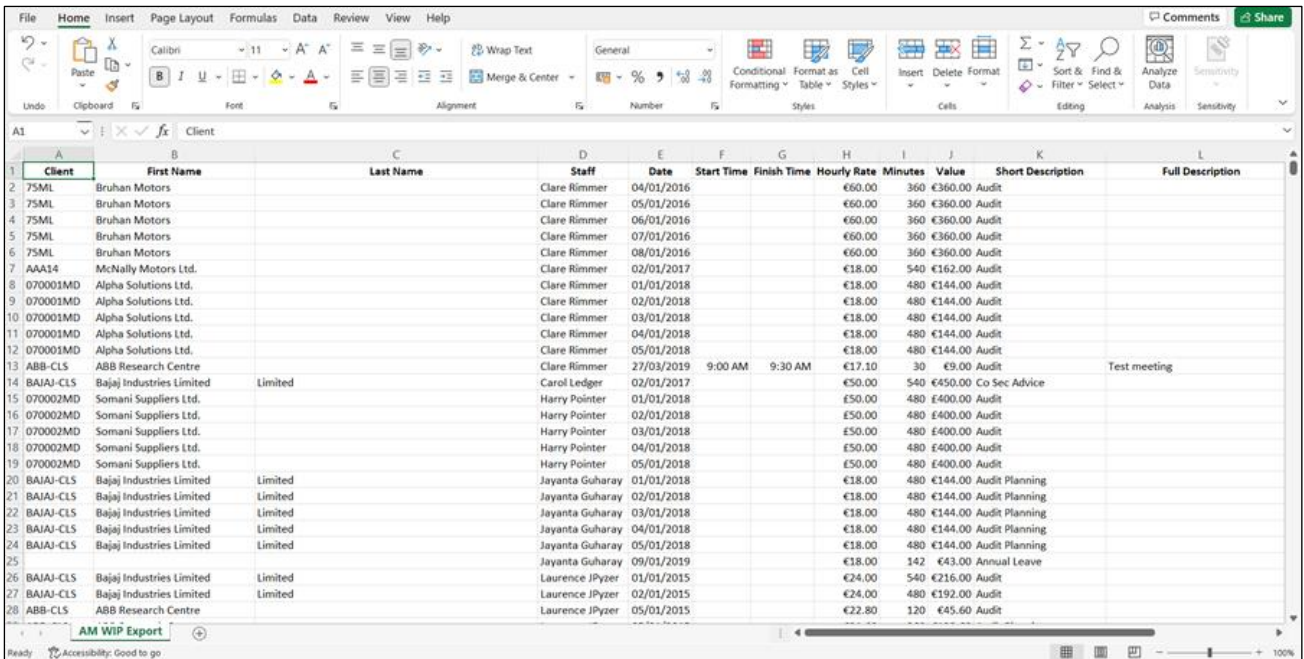


Figure: WIP Export in progress

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



Client	First Name	Last Name	Staff	Date	Start Time	Finish Time	Hourly Rate	Minutes	Value	Short Description	Full Description
75ML	Bruhan Motors		Clare Rimmer	04/01/2016			€60.00	360	€360.00	Audit	
75ML	Bruhan Motors		Clare Rimmer	05/01/2016			€60.00	360	€360.00	Audit	
75ML	Bruhan Motors		Clare Rimmer	06/01/2016			€60.00	360	€360.00	Audit	
75ML	Bruhan Motors		Clare Rimmer	07/01/2016			€60.00	360	€360.00	Audit	
75ML	Bruhan Motors		Clare Rimmer	08/01/2016			€60.00	360	€360.00	Audit	
AAA14	McNally Motors Ltd.		Clare Rimmer	02/01/2017			€18.00	540	€162.00	Audit	
070001MD	Alpha Solutions Ltd.		Clare Rimmer	01/01/2018			€18.00	480	€144.00	Audit	
070001MD	Alpha Solutions Ltd.		Clare Rimmer	02/01/2018			€18.00	480	€144.00	Audit	
070001MD	Alpha Solutions Ltd.		Clare Rimmer	03/01/2018			€18.00	480	€144.00	Audit	
070001MD	Alpha Solutions Ltd.		Clare Rimmer	04/01/2018			€18.00	480	€144.00	Audit	
070001MD	Alpha Solutions Ltd.		Clare Rimmer	05/01/2018			€18.00	480	€144.00	Audit	
ABB-CLS	ABB Research Centre		Clare Rimmer	27/03/2019	9:00 AM	9:30 AM	€17.10	30	€9.00	Audit	Test meeting
BAAIAJ-CLS	Bajaj Industries Limited	Limited	Carol Ledger	02/01/2017			€50.00	540	€450.00	Co Sec Advice	
070002MD	Somani Suppliers Ltd.		Harry Pointer	01/01/2018			€50.00	480	€400.00	Audit	
070002MD	Somani Suppliers Ltd.		Harry Pointer	02/01/2018			€50.00	480	€400.00	Audit	
070002MD	Somani Suppliers Ltd.		Harry Pointer	03/01/2018			€50.00	480	€400.00	Audit	
070002MD	Somani Suppliers Ltd.		Harry Pointer	04/01/2018			€50.00	480	€400.00	Audit	
070002MD	Somani Suppliers Ltd.		Harry Pointer	05/01/2018			€50.00	480	€400.00	Audit	
BAAIAJ-CLS	Bajaj Industries Limited	Limited	Jayanta Guharay	01/01/2018			€18.00	480	€144.00	Audit Planning	
BAAIAJ-CLS	Bajaj Industries Limited	Limited	Jayanta Guharay	02/01/2018			€18.00	480	€144.00	Audit Planning	
BAAIAJ-CLS	Bajaj Industries Limited	Limited	Jayanta Guharay	03/01/2018			€18.00	480	€144.00	Audit Planning	
BAAIAJ-CLS	Bajaj Industries Limited	Limited	Jayanta Guharay	04/01/2018			€18.00	480	€144.00	Audit Planning	
BAAIAJ-CLS	Bajaj Industries Limited	Limited	Jayanta Guharay	05/01/2018			€18.00	480	€144.00	Audit Planning	
25			Jayanta Guharay	09/01/2019			€18.00	142	€43.00	Annual Leave	
BAAIAJ-CLS	Bajaj Industries Limited	Limited	Laurence JPyzer	01/01/2015			€24.00	540	€216.00	Audit	
BAAIAJ-CLS	Bajaj Industries Limited	Limited	Laurence JPyzer	02/01/2015			€24.00	480	€192.00	Audit	
ABB-CLS	ABB Research Centre		Laurence JPyzer	05/01/2015			€22.80	120	€45.60	Audit	

Figure: Data Exported in Excel Format

