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 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.

Bright

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.

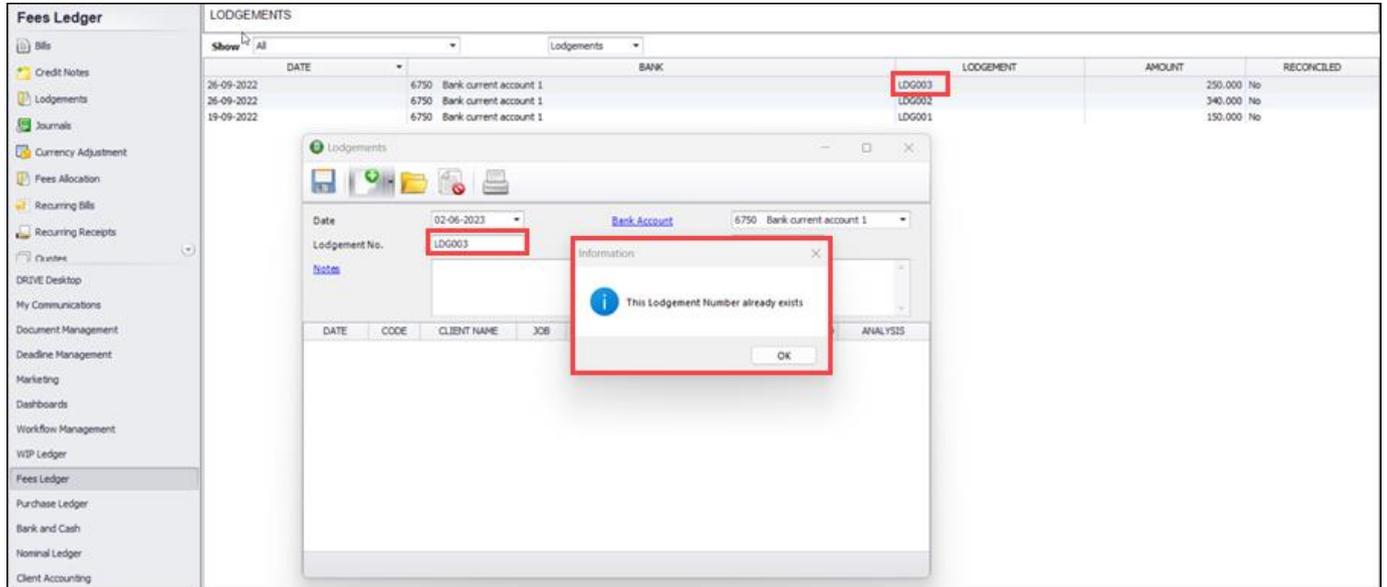You can view the existing list of Lodgment numbers from [**Fees Ledger**], [**Lodgement**].

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.
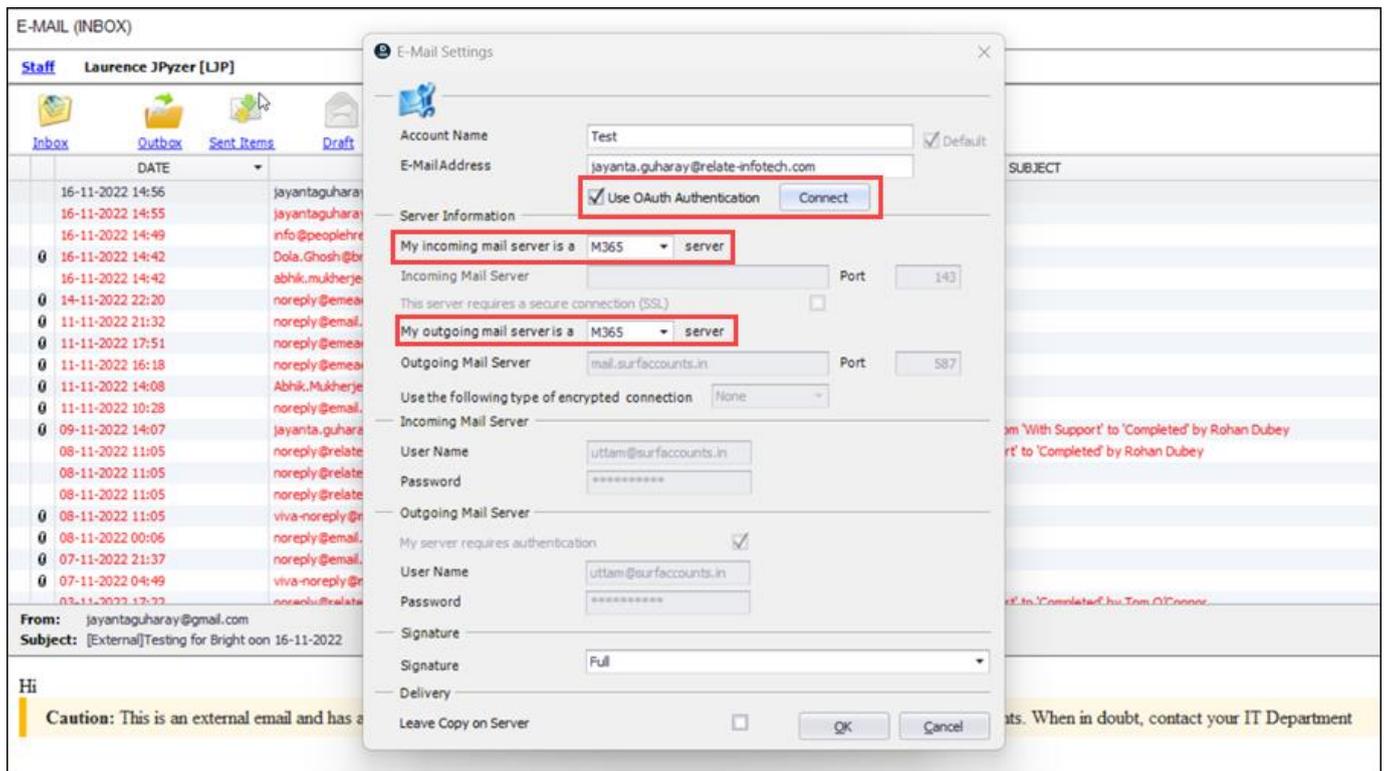

Figure: Separate OAuth Connection in Email Settings

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.

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**'.
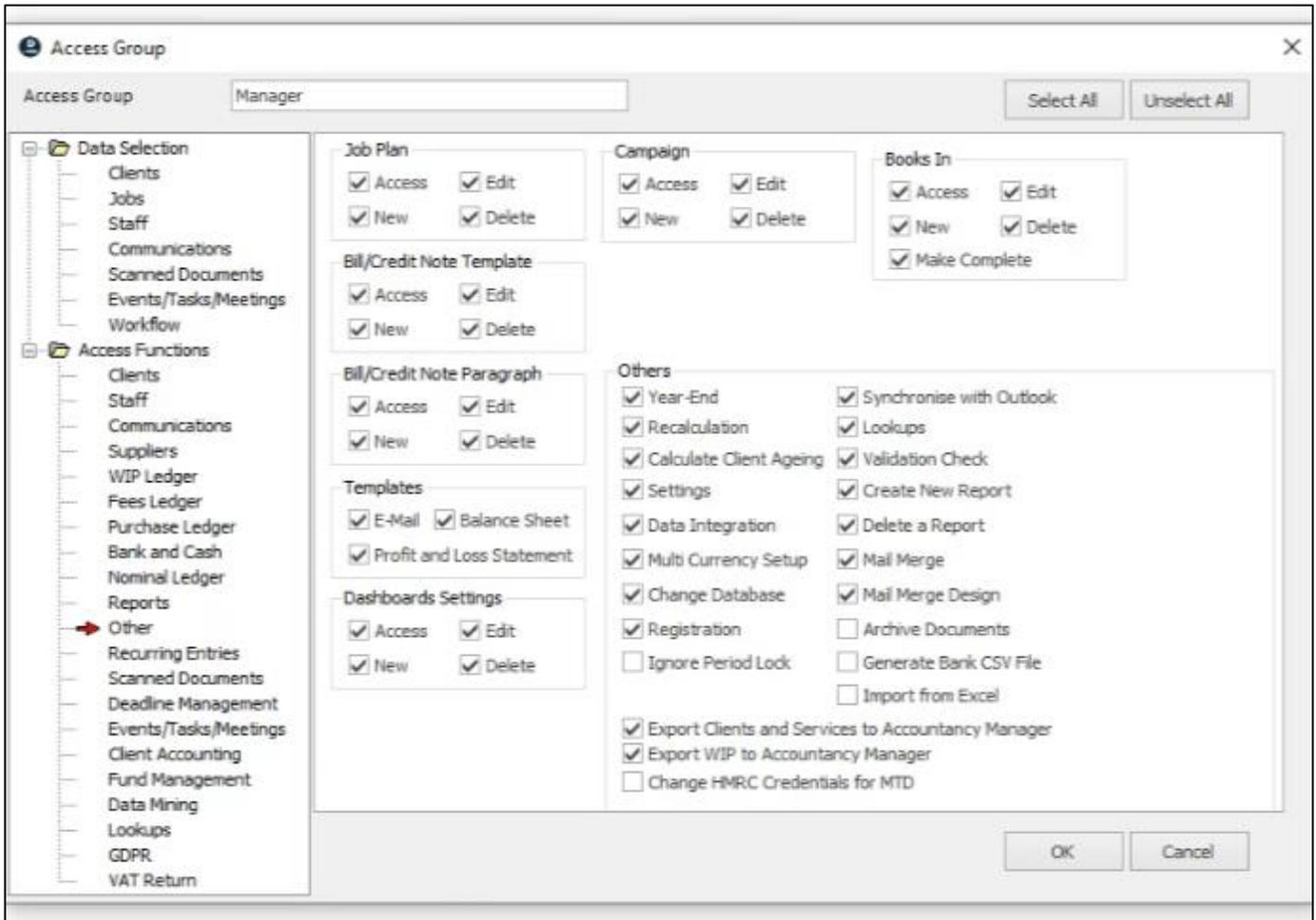

Figure: Edit Access Group

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**'.

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.
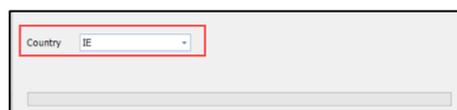

Figure: Clients and Services Data Export Begins

A progress bar will then be displayed.

Figure: Data Export in Progress

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

STAFF & PARTNER USERS		BUSINESS DETAILS					ACCOUNTING SYSTEM	COMPANY DETAILS (IF APPLICABLE)				Revenue.ie	
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
Stuart Bailey	Clare Rimmer	Bruhan Motors	Bruhan Motors		Irish Self Assessment						31/12		
		Dola Ghosh			Irish Self Assessment								Hindol
Susan Edwards		NIIT Technologies Limited			Irish Self Assessment								
Jayanta Guhara	Laurence JPyzer	Alpha Solutions Ltd.		Accountant	Irish Private Limited Company			CN123	CTR123				Monib
Clare Rimmer	Laurence JPyzer	McMahon Associates			Irish Partnership								
Stuart Bailey	Richie M McMah	Somani Suppliers Ltd.			Irish Private Limited Company								
Susan Edwards		McNally Motors Ltd.			Irish Private Limited Company								
Stuart Bailey	Clare Rimmer	ABB Research Centre		Hospital Trust	Irish Private Limited Company								Autom
Susan Edwards	Richie M McMah	ABC Corporation Limited			Irish Private Limited Company								Jayant
Jayanta Guhara	Raymond Roger	Bajaj Industries Limited		Zoological Gardens	Irish Other			TTK	ERY				United
Jayanta Guharay		Child Client-1			Irish Private Limited Company								
Clare Rimmer		Child Client-2			Irish Private Limited Company								
Jayanta Guharay		COSEC Client Limited			Irish Private Limited Company								
Stuart Bailey	Richie M McMah	East India Company			Irish Other								
Stuart Bailey	Richie M McMah	Hexagon Engineeering Limited		Architect	Irish Private Limited Company			CN4589	CT7745				Hindol
Susan Edwards		Jayanta Ltd.			Irish Other								
Susan Edwards	Clare Rimmer	Jupitar Cooling Towers			Irish Private Limited Company								
		Jigma Motors Limited			Irish Private Limited Company								
Jayanta Guharay		Jupitar Trading Company			Irish Private Limited Company								
Susan Edwards		Jupitar Tours & Transport			Irish Private Limited Company								
Clare Rimmer		L & T Infotech		Accountant	Irish Private Limited Company								
Jayanta Guhara	Clare Rimmer	MCDONALD CLEANING SERVICES LIMITED			Irish Private Limited Company			147063					

AM Import

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 year-end 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.'
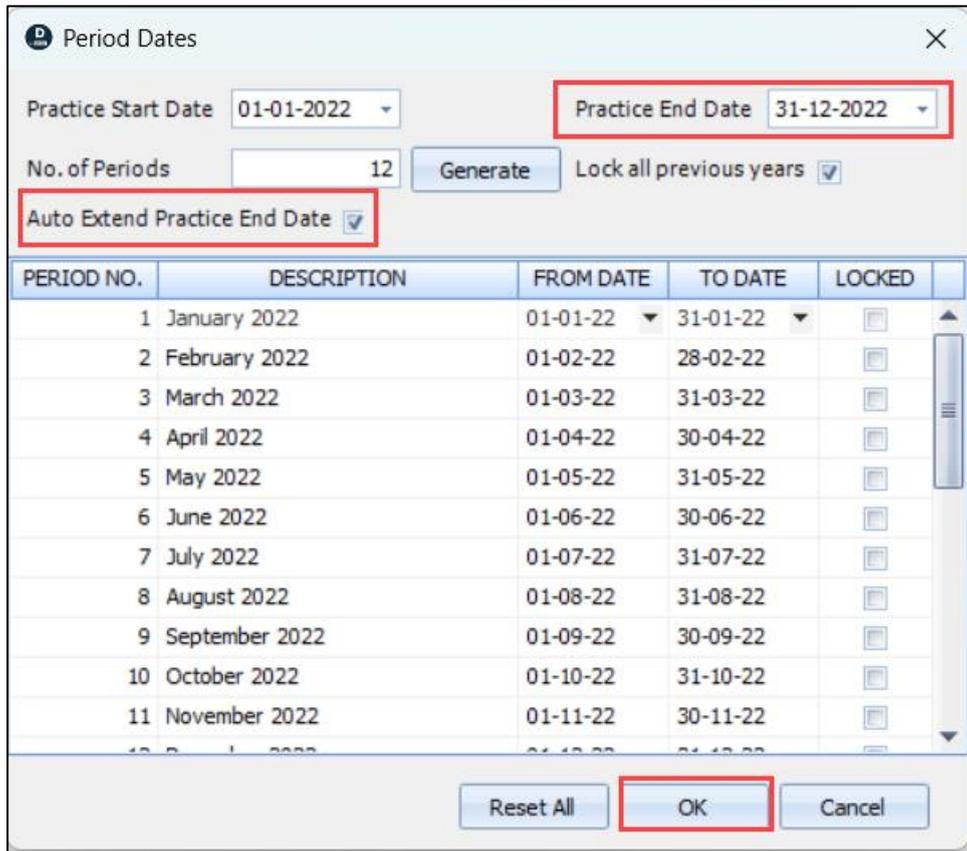

Figure: Auto Extend Practice End Date Checkbox

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.
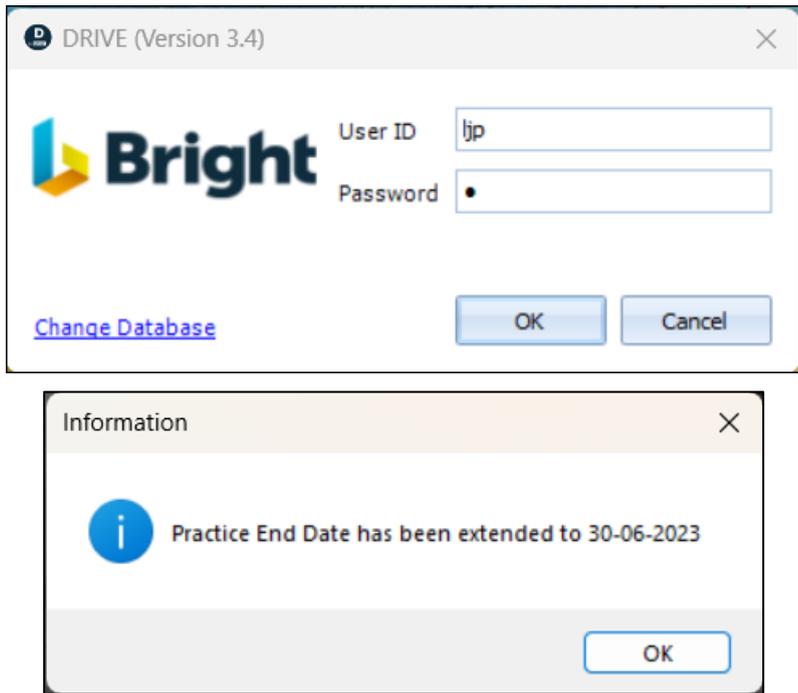

Figure: Practice End Date Confirmation Message

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.

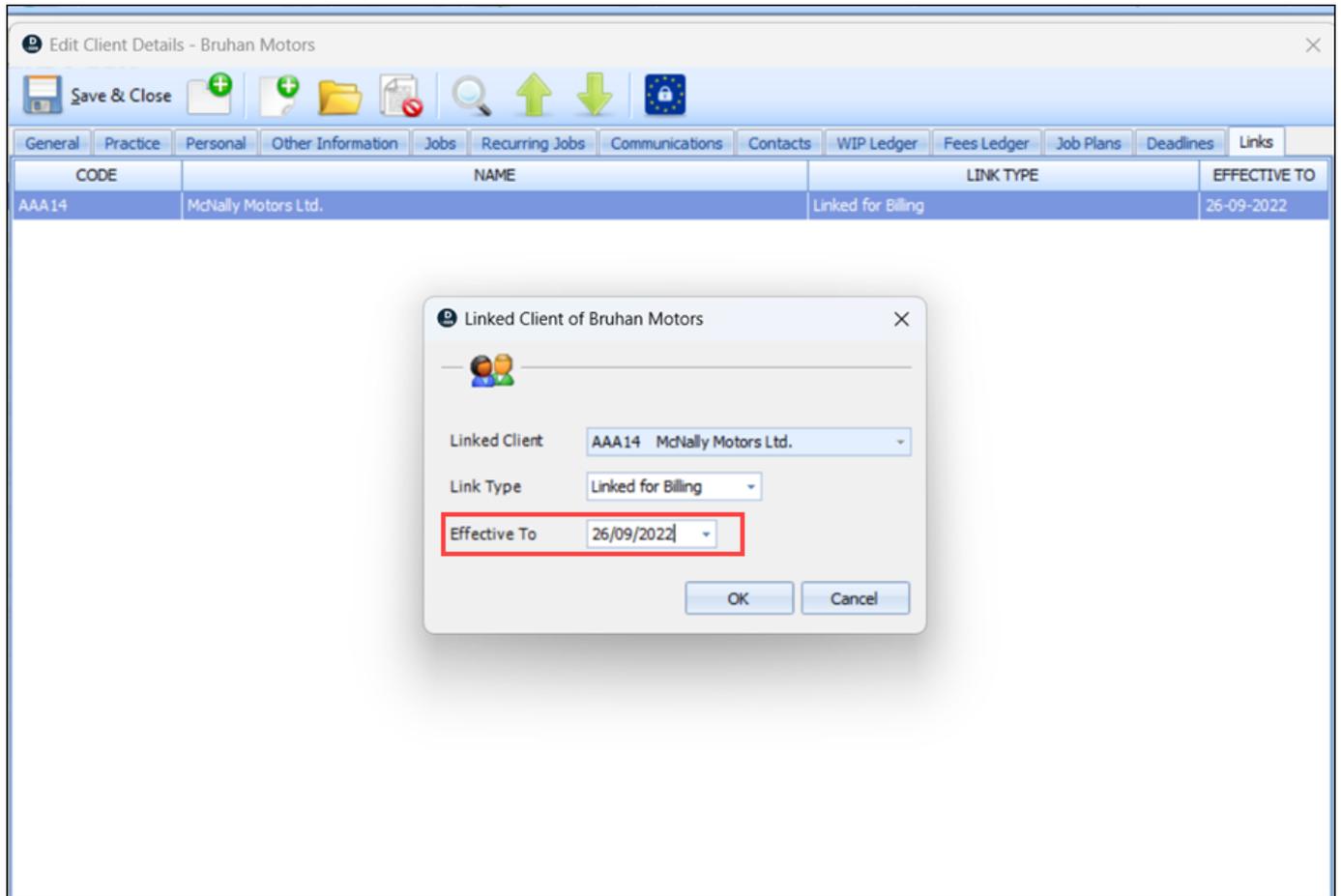**Note:** Bills generated prior to the 'Effective To' date will remain valid/unchanged.

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.
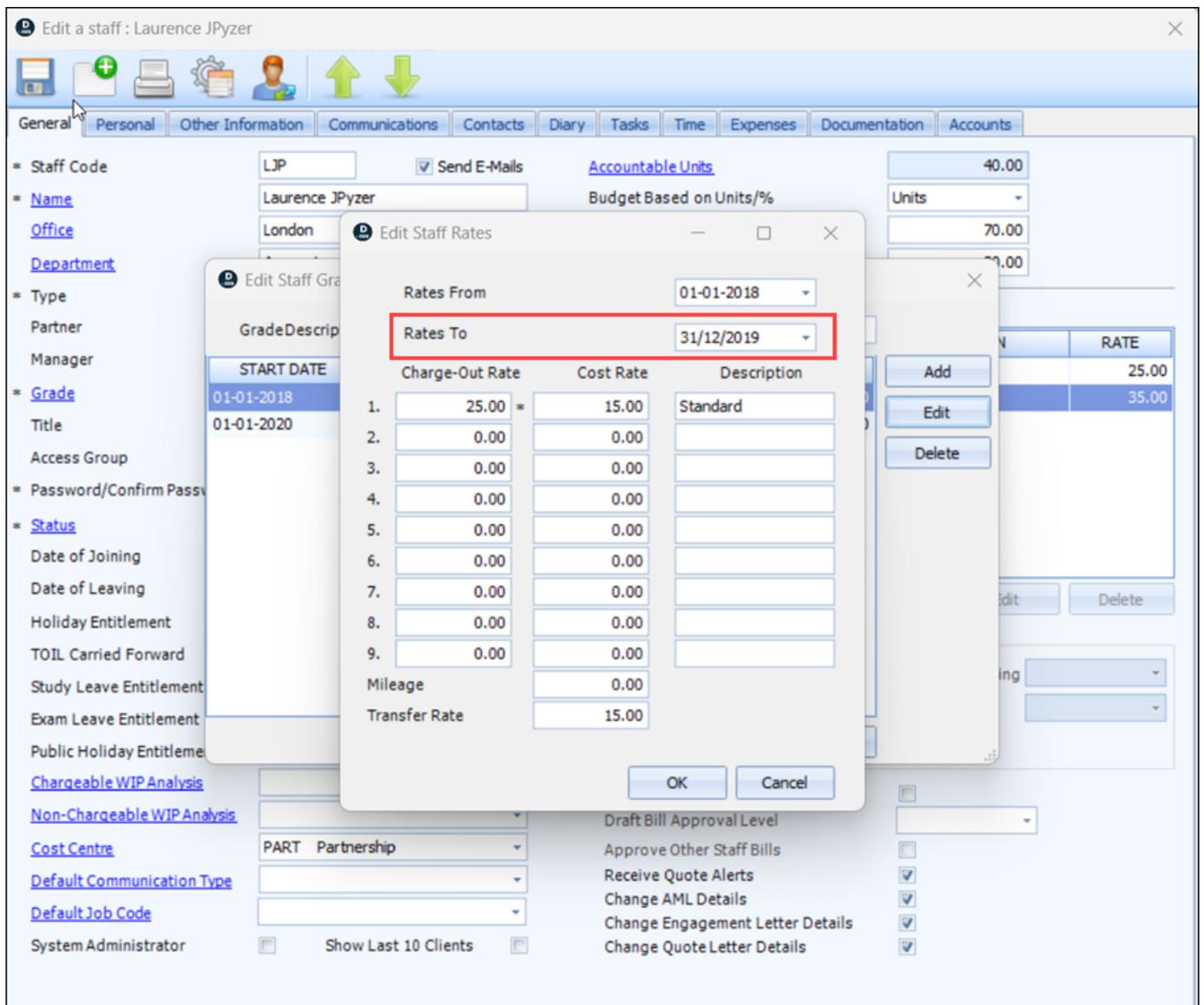

Figure: Automatically Update 'Rates To' Field