



Version 5.01 New Features

Build 10 compiled on 9th June 2017



Introduction

Welcome to Accura Version 5.01

Version 5.01 is the latest release for the Accura MIS and the first to use the latest generation of the Clarion Development platform. The move to Clarion 10 doesn't not affect the way Accura will work but it does support the latest operating system technologies and will allow us as software developers to make use of the latest tools and methods to bring you, the end-user, new features and functionality.

In addition to the upgrade to the latest development platform, Accura 5.01 introduces a multitude of new features and fixes to the MIS and its related applications.

All clients with a current support contract for Accura (and AccuraOnline if purchased) are entitled to receive and install all software releases as part of their support contract benefits. If you have not already done so, please [sign up for an account](#) on our website to access protected software downloads, user manuals and other content. AccuraOnline upgrades are distributed automatically when released by Accura support.

If you have any questions or queries about the new features or any other Accura related matter, please contact your Accura Support team by emailing support@accuramis.com.

About This Document

This **New Features** document details all the major features added to Accura and Accura Online since the last public releases - Accura 4.74 and Accura Online 3.97.

If you are an end user, please read through this document which summarises the major new features likely to be used by end users.

The technical release notes are aimed at Accura system administrators, advanced users, and Accura support personnel. This is available

Previous versions of release notes and the technical release notes, which are aimed at Accura system administrators, advanced users, and Accura support personnel, can be found in the Online Resource Area which can be accessed from the Accura Help Menu.

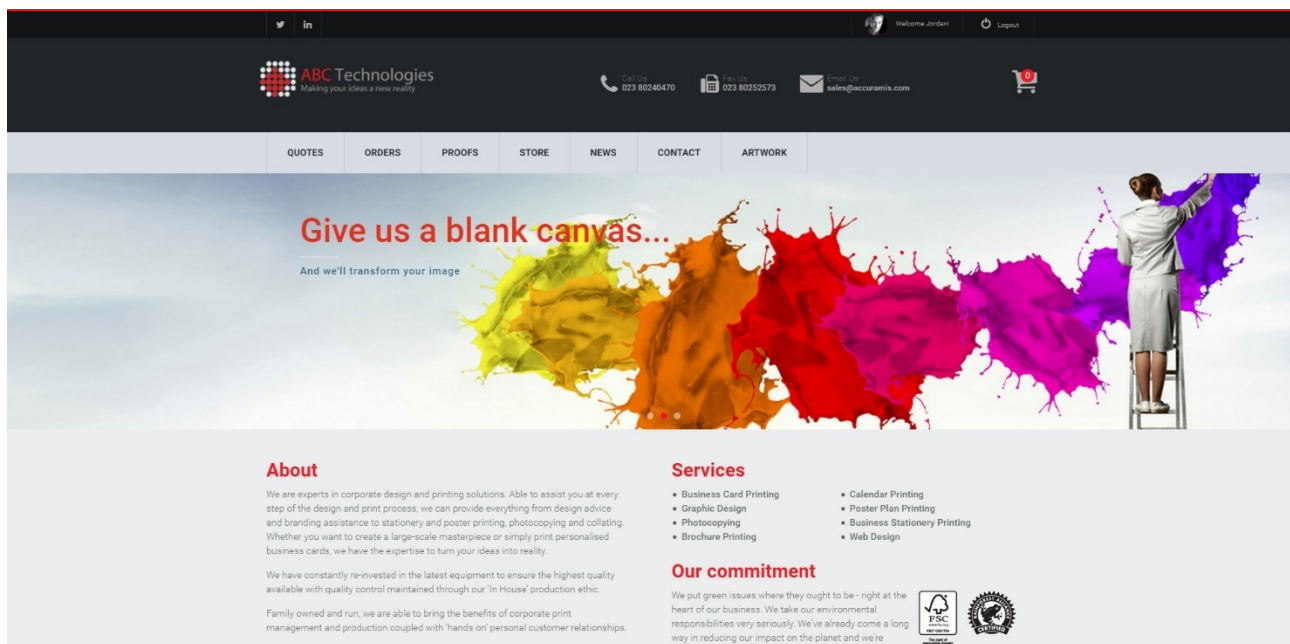


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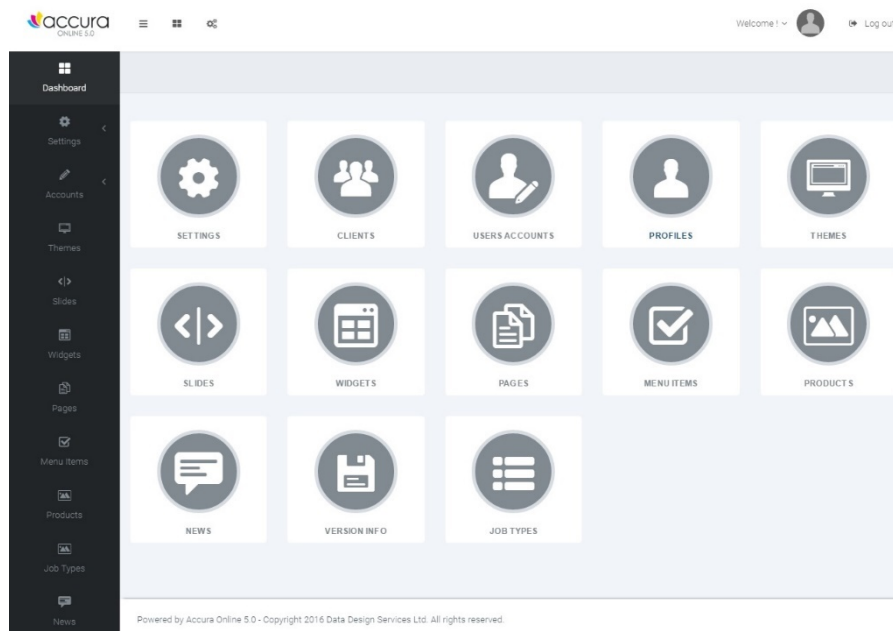


Accura Online 5



The flagship feature of Accura Version 5 is compatibility with our revamped web to print module, **Accura Online 5**. AO5 is designed to be a fully responsive website that will look as good on your iPhone as it does on your desktop. With Quotes, Orders, Proofing and Store as standard features, AO5 now boasts **client branding** as standard as well as configurable menus, custom pages and many other new features.

Admin Dashboard



The old Accura Online admin area has been replaced with a more intuitive **dashboard** to enable the admin user to quickly navigate around the various features.

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@ support@accuramis.com
➔ www.accuramis.com

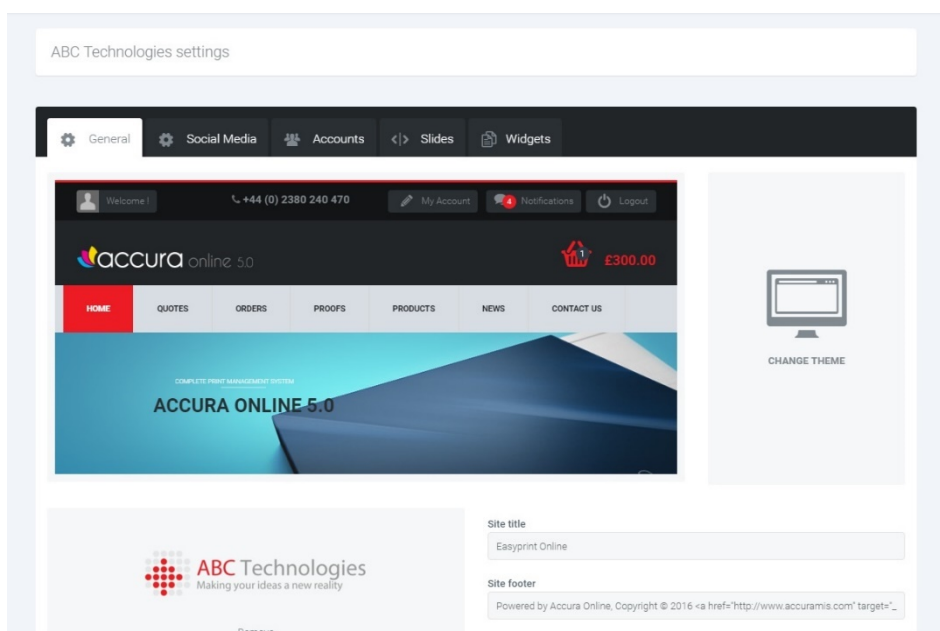
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Some notable features that are accessed through the dashboard are:

- The ability to easily upload your own logo
- Changing the theme for both the main site and for individual clients
- Front page slides can be uploaded for both the main site and individual clients
- The website menu system can be customised globally or for selected clients
- Customised pages can be created which can then be linked to new menu items
- The default Home, About Us, Privacy and Terms pages can be customised
- User account administration
- Products can be linked to the artwork editing module
- Products can be assigned multiple images

Theming

There are currently three different highly customisable theme designs. Changing the theme will slightly alter the layouts of some pages to give the user interface a slightly different feel. As well as the layout, the default colouring used throughout the theme can be changed to any colour so you can match your corporate branding.



In addition to the generic site theming, each client can have their own customisations so their users of your site can feel more at home. The default colour, theme, logo and slides are among the features that can be changed. The maximum recommended size for a logo image is 300 x80 pixels, ideally with a transparent background

Slides

AO5 has an integral image carousel on the landing page of your website. Your own slides can be easily uploaded to your AO5 database and you can also specify a title, a strapline and even set each slide to link to different pages on your AO5 or to external URLs. For best results, your custom slides should be a minimum of 1900 x 380 pixels @ 72dpi for the default Revolution slider. Slides sizes for Flex Slider and for the Flex Thumbs Slider should be 1140 x 470 pixels.

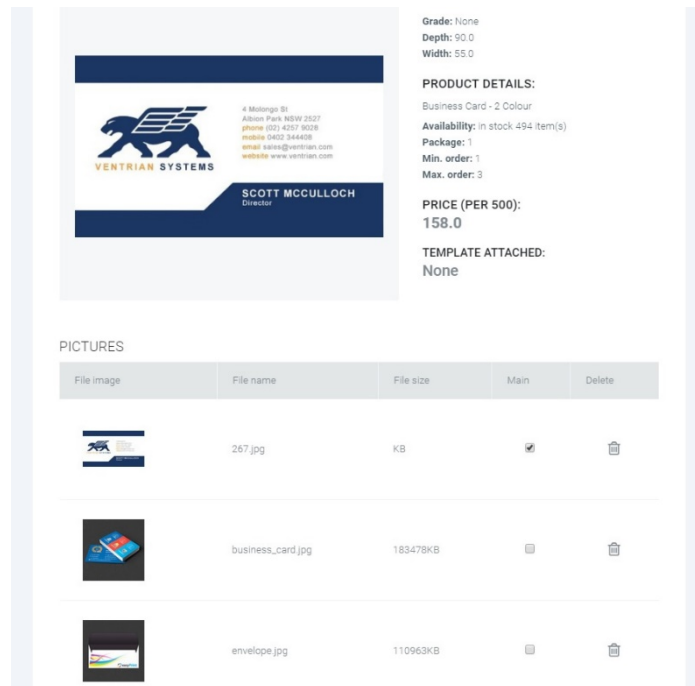
As well as the generic site slides, clients can have their own set of slides too meaning you could promote different products and services targeted to a specific type of client.



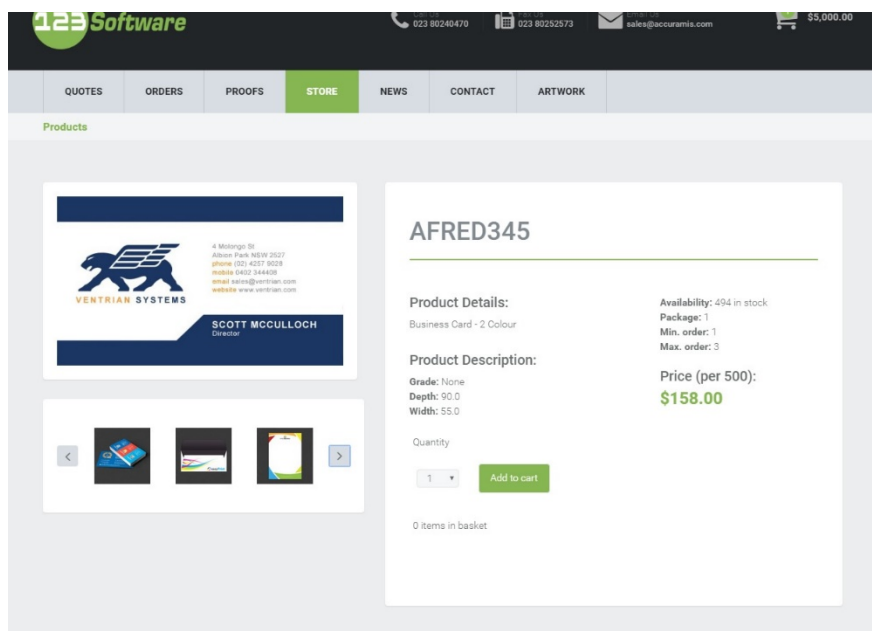
Product Images

In the older format of Accura Online, products could only have one linked image. Accura Online 5 introduces the concept of multiple images per product. This is ideal if you sell items that have multiple aspects so the user can see the products from each side.

The main default image is selected as previously into Accura which is then synced up to the website products. Further images are then attached to the product on the Products pages of the Admin dashboard.



When a user views the product on the website, underneath the default image, there will be an image carousel where they can flick through the images and enlarge them for a better look.



Menu Options

The main navigation Menu is now completely configurable by the admin user. Menu options can be added, removed, re-ordered, require a log in to view or hidden completely.

The screenshot displays the 'Menu Options' admin interface. On the left is the 'Edit' form, and on the right is the 'Menu Items' table.

Edit Form:

- Name:** Artwork
- Link to:** Artwork guidelines
- Clients:** All clients (dropdown menu with options: 123 Software Ltd, Abstract Group Inc, Test Company PLC, ABC Technologies, Acme Print & Design (prepay))
- Published:** ☒ Published
- Requires login:** ☐ Requires login
- Buttons:** Cancel, Delete, Update

Menu Items Table:

Name Items	Name Client	Delete	Edit	Down	Up	Published
Quotes	All					
Orders	All					
Proofs	All					
Store	All					
News	All					
Contact	All					
Artwork	All					

Page: 1 of 1 | Quantity per page: 10

In the example above, a custom menu item of Artwork has been created and linked to Artwork guidelines which in turn is a custom page that details the requirements for acceptable submitted artwork. As you can see Requires login is unchecked meaning any visitors can see this page; both existing clients or potential customers.

Shopping Cart

The **shopping cart** feature has been totally redesigned to give a more familiar store experience similar to all major e-commerce sites. The cart icon will tell you how many items you have in your basket and hovering over the cart icon will pop-up a cart summary so you can see what items have been selected as well as go to the cart proper or directly to the checkout.

The screenshot displays the 'Shopping Cart' interface. The main table lists items with their product images, descriptions, availability, quantities, and prices. A mobile view overlay is shown on the right, displaying the cart summary and checkout options.

Shopping Cart Table:

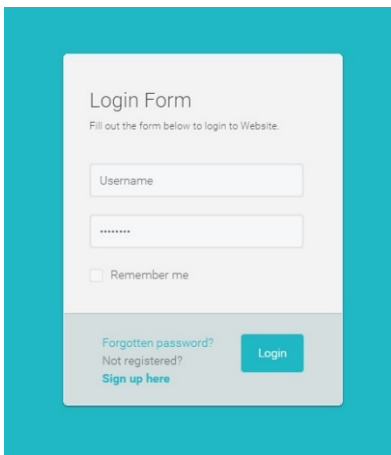
Product	Description	Availability	Quantity	Price	Per	Net	Delete
	eDocBuilder AO Leaflet	1280 in stock	100	\$5.00		\$500.00	
	Amazing Print Businesscard	Not in stock	250	\$212.00		\$53000.00	
	Easyprint business card - Eddi	Not in stock	250	\$212.00		\$53000.00	

Mobile View Overlay:

- Order Total:** \$924.00
- View Cart** button
- Checkout** button
- Items in Cart:**
 - EDOC_AO eDocBuilder AO Leaflet Quantity: 100 \$500.00
 - AMAZINGOBC Amazing Print Businesscard Quantity: 250 \$53000.00
 - EDOC_EASYBC Easyprint business card - Eddi Quantity: 250 \$53000.00



Business to Business Mode (B2B)



In addition to the Business to Customer (B2C) model the previous version of Accura Online used, **AO5** has the option of a **Business to Business** mode.

When the website is switched to this mode, users going to your website don't go directly to your home page. Instead they go to a log in page and from there are allowed entry to your website. This method of working is ideal for utilising the new client branding features available in AO5.

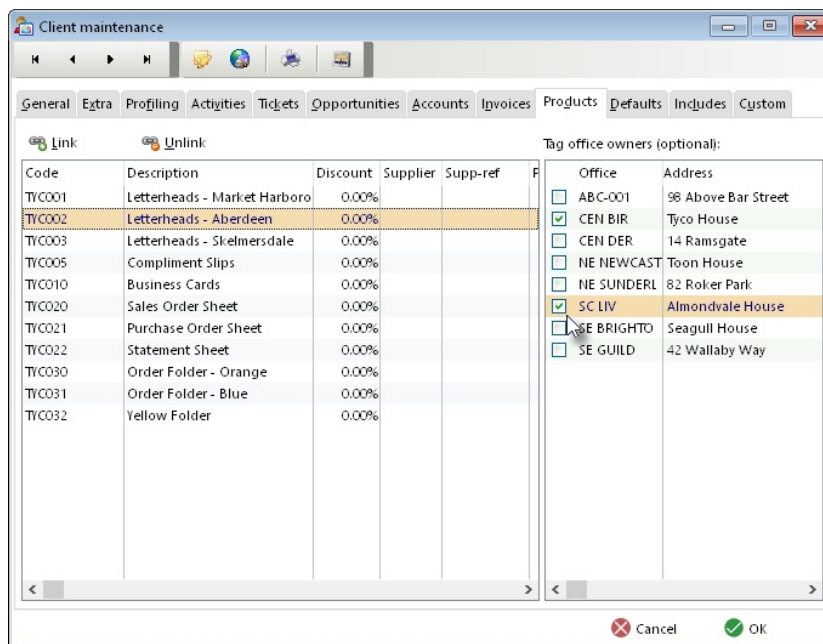
For a full list of Features and Changes, see the Accura Online detailed notes [below](#).

Store Product Office Ownership

In previous versions of Accura, store products could only be owned by a client. In version 5, this is taken to a new level by having the ability to have products specific to a client's **offices**. This means that a user logging into the store will only see products relevant to their office and products meant for other offices will be hidden from their view.

This is very useful in the scenario where you have a client head office and many branches, all with branch specific products. Using this new filtering, branches will only see products that belong to them as well as generic client products.

Assigning office owners can be assigned one of two ways; either in the Client maintenance Products tab or a Product's Owners tab.



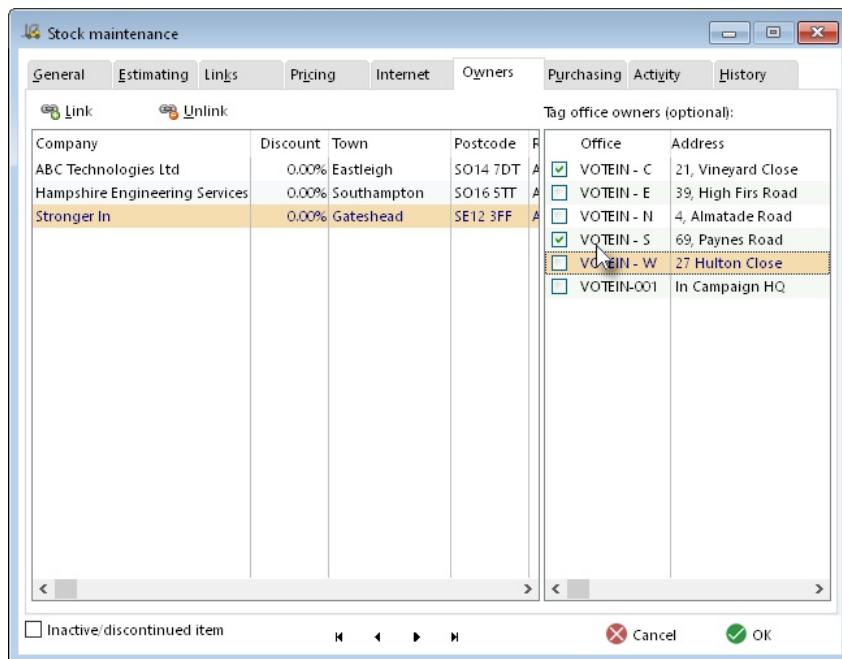
Code	Description	Discount	Supplier	Supp-ref
TYC001	Letterheads - Market Harboro	0.00%		
TYC002	Letterheads - Aberdeen	0.00%		
TYC003	Letterheads - Skelmersdale	0.00%		
TYC005	Compliment Slips	0.00%		
TYC010	Business Cards	0.00%		
TYC020	Sales Order Sheet	0.00%		
TYC021	Purchase Order Sheet	0.00%		
TYC022	Statement Sheet	0.00%		
TYC030	Order Folder - Orange	0.00%		
TYC031	Order Folder - Blue	0.00%		
TYC032	Yellow Folder	0.00%		

Office	Address
<input type="checkbox"/> ABC-001	98 Above Bar Street
<input checked="" type="checkbox"/> CEN BIR	Tyco House
<input type="checkbox"/> CEN DER	14 Ramsgate
<input type="checkbox"/> NE NEWCAST	Toon House
<input type="checkbox"/> NE SUNDERL	82 Roker Park
<input checked="" type="checkbox"/> SC LIV	Almondvale House
<input type="checkbox"/> SE BRIGHTO	Seagull House
<input type="checkbox"/> SE GUILD	42 Wallaby Way



In Client maintenance, go to the Products tab. To link to a new product, click the **Link** button. This will display a list of products so select the one you need. Once this done, you will see the product listed and in the right-hand pane, a list of all the offices that belong to that client. By default, they are unticked and this means that all the offices for that client are owners of that product. If you tag one or more offices, then they become owners of that product. Any unticked office will not see that product online.

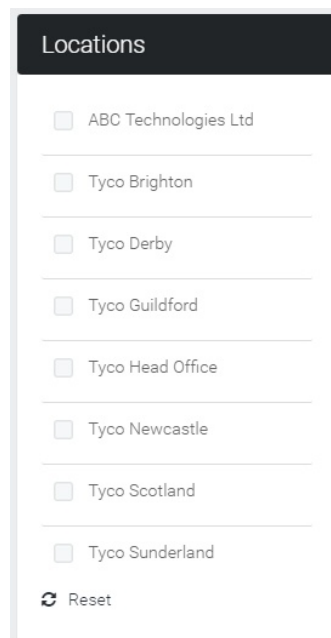
To link the offices through the product, open the product maintenance and go to the Owners tab. When the **Link**



button is pressed, a list of clients is displayed. Here, one or more clients can be selected in as owners of the product using CTRL or SHIFT + click. When a client is highlighted, their offices will then be displayed in the right-hand pane. The office owners can then be selected via tagging as explained above.

When users log on to the website, they will only see the products that belong to their office, their generic client products and your public products. In some situations, you may have the scenario where you have a client user, such as a print buyer for example, who needs to see ALL products for ALL offices. Users who need this ability should be assigned a security profile in the website Admin area that has the permission **View all locations (offices)** selected.

User accounts that have this permission enabled in their security profile will have an extra **Locations** filter in which they will see all and be able to show and filter by all their office locations.



Major New Features in Accura Version 5.01

Carrier Integration

We regret to announce that carrier integration with iAbol has been removed from Accura. Unfortunately, features, functionality and pricing structures that were promised to us (DDS) by them never materialised and after much negotiation, it became clear that they never would. This led to us to make the decision to sever ties with iAbol. We apologise for any inconvenience caused by this. We are extremely disappointed too as we spent many man-hours developing and testing this feature. We will be looking to find another service to replace the iAbol link and will publish any news on our [website](#) or [LinkedIn](#) page.

Clients, Contacts and Offices

Accura V5 introduces a new way of linking contacts to specific office. This feature has been added primarily due to customer requests and is integral to new product ownership functionality in Accura Online.

Contacts can now be linked to offices and this can be maintained from both the Office Details – Contacts tab or the Contact's office field. There can be a primary contact, delivery and accounts contacts that will function as the used to do for the parent client.

Transaction contact fields will now intelligently filter based on the office that has been selected. Only contacts that have been linked to the office and those that are linked to no office will display in the contact dropdown. On legacy transactions (i.e. those created before the V5.03 upgrade), the contact dropdown will display ALL contacts for ALL of the client's offices.

The image shows two overlapping windows from the Accura software. The background window is titled 'Office details - ABC Technologies Ltd' and has tabs for General, Contacts, Accounts, Attachments, and Notes. The 'Contacts' tab is active, showing a list of contacts: Barry Burger (Warehouse Manager), Helen Highwater (Branch Manager), and Jenny Frenchfry (Accounts). The foreground window is titled 'Contact details - ABC Technologies Ltd' and has tabs for General, Web, and Extra. The 'General' tab is active, showing fields for Title (Mrs), Firstname (Helen), Lastname (Highwater), Name (Helen Highwater), Salutation (Helen), Position (Branch Manager), Office (14 Ramsgate), Marketing role (None), Tel, Ext, Fax, Voip, Mobile, Email (helen@tyco.com), Department, and Category (Trade). There are also social media links and a 'Primary contact' checkbox.

The image shows the 'Quote details' window in Accura software. It has tabs for General, Statistics, Sections, Attachments, Workings, and Analysis. The 'General' tab is active, showing fields for Client (ABC), Office (CEN DER), Name (Tyco Derby), Address (14 Ramsgate, Derby, Derbyshire), Contact (Helen Highwater), Title, and a dropdown menu for selecting a contact. The dropdown menu shows: Barry Burger, Helen Highwater (selected), Jenny Frenchfry, and Mary Mustard. There is a checkbox for 'Create specification from workings'. Below the contact selection, there are tabs for Size, Quoted Imposition, Pre-press, Proof, Printing, Materials, Finishing, Notes, Delivery, Special, Other, and Private. The 'Printing' tab is active, showing a 'Phrase' field. At the bottom, there is a 'Spelling' checkbox and 'Cancel' and 'OK' buttons.

It's important to bear in mind that a contact can only be linked to one office. If a contact is to be used for different offices, then they should not to be linked to one at all.



Contact records now also have a **web role** which can be found on the Web tab. This will allow a contact with the role of **user** to be assigned an **approver**, someone within their parent client who will receive a notification of any orders that they place when they are processed through Web Console. Please note, the **Notify approver** option must be switched on for the approver to receive the emails.

This function can work concurrently or separately from the User / Approver functionality already available through AccuraOnline security permissions.

Contact details - ABC Technologies Ltd

General Web Extra

☒ Allow web module access

Web settings

Web user role: User

Approver/manager: Steve Guidroz

☒ Notify approver when web order received

☐ Web orders require pre-payment

☐ Primary contact

Cancel OK

Social Media

With social media becoming an integral part of promotion and marketing for every company, we have added dedicated fields for LinkedIn, Twitter, Google+ and Facebook to various areas of the software.

System information

General Numbering Bank Modules

Name: Accura Version 5

Address: Lakesbury Mews
Hiltingbury Road
Chandlers Ford
Town: Eastleigh
County: Hampshire
Postcode: SO53 5SS
Country: United Kingdom
Tel: +44 (0)23 8024 0470
Fax: +44 (0)23 8025 2573
Web: www.accuramis.com
Email: sales@accuramis.com
Logo: C:\Program Files (x86)\Accura\accura_logo.jpg

Social media links

in https://www.linkedin.com/groups/4054410

f https://www.facebook.com/Accura-MIS-287113648019709/?fref=ts

t https://twitter.com/AccuraMIS

g+ https://plus.google.com/u/0/

Company Reg: 2233967
Tax reg: VAT REG
Currency: GBP

Cancel OK

Email dialog: D:\...
Send Cancel Spell
Message Attachments
To: gavin.spooner@accuramis.com
Cc:
Bcc:
Subject:
Source
B I U S X
Styles Format
Gavin Spooner
Development Minion
accura
Accura V5
Lakesbury Mews
Hiltingbury Road
Chandlers Ford
Eastleigh
Hampshire
SO53 5SS
Phone: +44 (0)23 8024 0470
Fax: +44 (0)23 8025 2573
Email: gavin.spooner@accuramis.com
Web: www.accuramis.com
body span strong



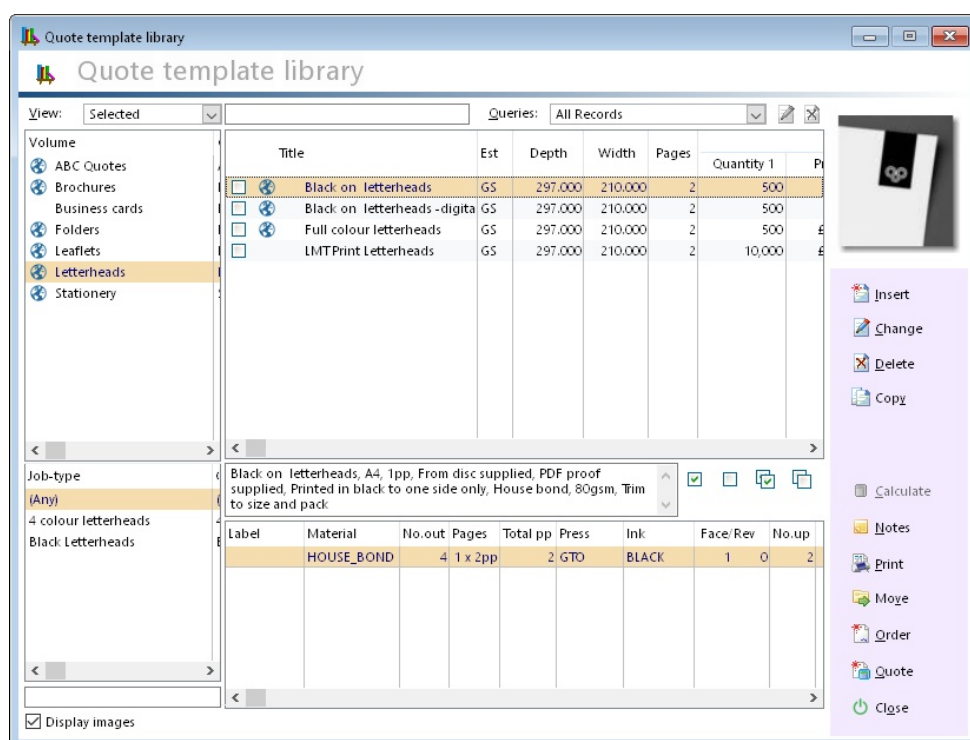
Social media fields have been added to the main company details area (Setup - Program) for generic company details and also to user profiles for more specific links. When a social media field is populated, the icon next to it will become 'lit' and take you to the URL if it's pressed.

New merge tokens have been added to display social media icons which will show dynamically on the html email signature if the user or company have their social media fields populated. The new fields are also available throughout Report Designer should you wish to add them to your custom layouts.

Social media fields have also been added to the user interface for clients, suppliers and contacts. And these can also be added to email templates and Report Designer layouts if required.

Quote Template Library

The functionality of the Quote Template Library has been reworked in Accura 5. In previous 4.7x versions of Accura, quote volumes were children of job types. This was done to enable a nesting system of multiple volumes that could be categorised under one job type.



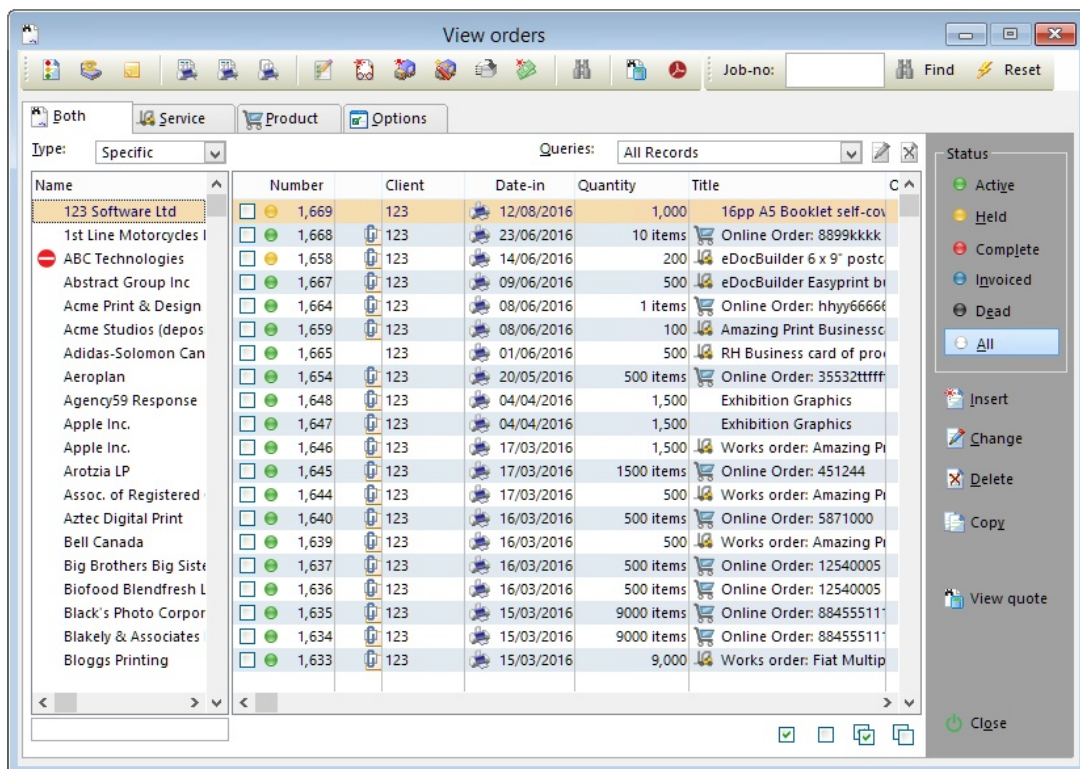
In Accura 5, this has been reversed. Now volumes are the parent and job-types can be children of one, many or no volumes at all. This is a more logical way of creating the nesting system and should make for a more intuitive experience. It also allows better filtering in the Accura Online 5 module

For users already using the job-type-volume system, the upgrade procedure will attempt to reverse link the job-type - volume relationship where it can. It will be necessary to review your template library after the upgrade to ensure your links are correct and so you can start using the new method efficiently.

In previous versions of Accura when you deleted a volume, all of the child quotes were deleted too. This meant quotes could be inadvertently deleted by unwary users. In Accura 5, if a volume containing child quotes is deleted, a volume called Temporary Recycle Bin will be created and all the child quotes will be transferred to this. From here, the quotes can either be re-assigned to other volumes or permanently deleted.



Order Browsers



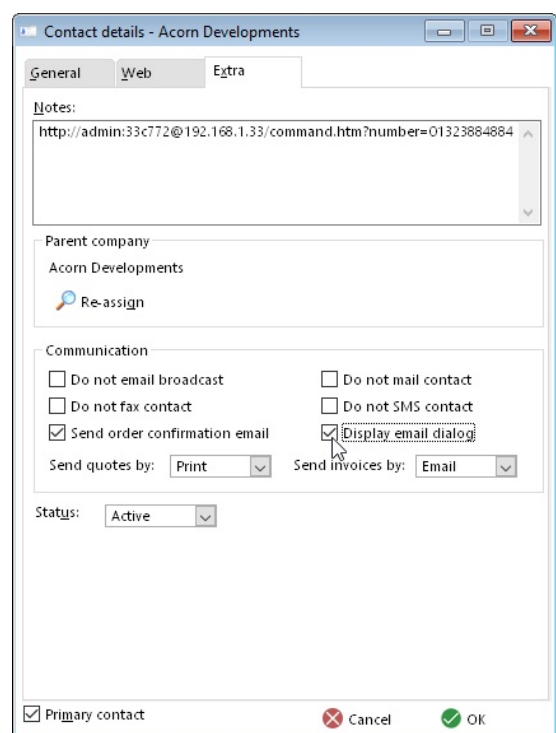
Orders browses that previously had the option to display the different order types Both, Product and Service have been changed from using a drop-down list on the Options tab to a tabbed view in the main browse. This makes it quicker and easier to switch between the different order types. Affected browses include - View Orders, View Costing Data and View Order Sales Analysis.

Order Confirmation Emailing

It's been possible to automatically email clients with an order confirmation email. In Accura V5, this has changed to be a contact rather than client level function. Individual contacts can now be sent these automatic emails rather than a blanket setting for the client.

Contacts for clients that had the confirmation email option switched on before the upgrade to V5 will have this setting enabled during the upgrade.

When a contact's **Send order confirmation email** is turned on, the **Display email dialog** check box will become enabled. If this is ticked, automatic order confirmation emails will display before sending to enable editing the email rather than being sent silently in the background. Again, this is a contact specific setting.



Proof Synchronisation

The proofing window has been given new options to control the synchronisation of proof response emails being returned by the customers.

View pending proofs

General Options

Search criteria:

Starting: 12/08/2016 Ending: 10/11/2016 Reset

Client: Job-number: 0

Entered by:

Description must begin with:

Description must contain:

Reminder email

Email template: D:\Accura\C10\Data\templates\email\ProofRemind.htm

☒ Use send dialog for proof reminders

☒ Use custom synchronisation email settings

Custom receive settings

IMAP/POP Server: pop.gmail.com

Username: accuramis@googlemail.com

Password:

Encryption: SSL Port: 995

☒ Auto-sync proof response emails (every 2 minutes)

☒ Remove proof emails on completed sync

☐ Load this window on startup

Previously, it was only possible to sync in client response emails from Outlook. With the advent of more browser-based email clients, Outlook is becoming less and less relevant. In Accura 5.01, it's now possible to sync in client proof responses from POP accounts from email providers such as Gmail and Office 365.

The POP settings should be set up in a similar way to the above screenshot but you should refer to your provider for the necessary details. Please be aware that there are settings in your POP account that controls whether emails are deleted from the server after being synced into a POP client as Accura is acting as in this scenario. We cannot be held liable for any loss of data so please test the impact on your email account before going live. Please refer to Accura support for advice when necessary.

The **View pending proofs** browse can now be set up to automatically check for client response emails from either Outlook or your POP account. When switched on, the View proofs browse will poll your chosen email client to check for emails that have a subject line containing the trigger words. When a relevant email is detected, a proof response window will open for the user to process the incoming response. The View pending proofs browse needs to remain open for the auto-sync to function.

The proof response function can now be set to always delete proof response emails from you Inbox using the new option **Remove proof emails on completed sync**. Please note this option will only work when syncing from Outlook.



Update proof response: 1014

Proof notes/rejection
 Response: Date: 10/11/2016 Time: 11:26

Customer-comments:
 [EMAIL RESPONSE]
 Job Title: Full colour letterheads, A4, 1pp, Printed in black to one side only, House bond, 80gsm, Trim to size and pack
 I will accept this proof subject to the following changes:
 Please see if the main image resolution can be improved.
 Proceed to production WITHOUT supplying another proof.

Checked by:
 Milestone:

Job details:
 Job-No: 1066 Client: Version 5
 Specification:
 Full colour letterheads, A4, 1pp, Printed in black to one side only, House bond, 80gsm, Trim to size and pack

Right sidebar:

 (highlighted)

If a proof response is received with one or more attachments, these can be viewed from the **Update proof response** dialog.

Any attachments will be stored in Data\Attachments\Proofs on the Accura server. The attachments will also be forward on the automated email to the studio manager if this function has been set up.

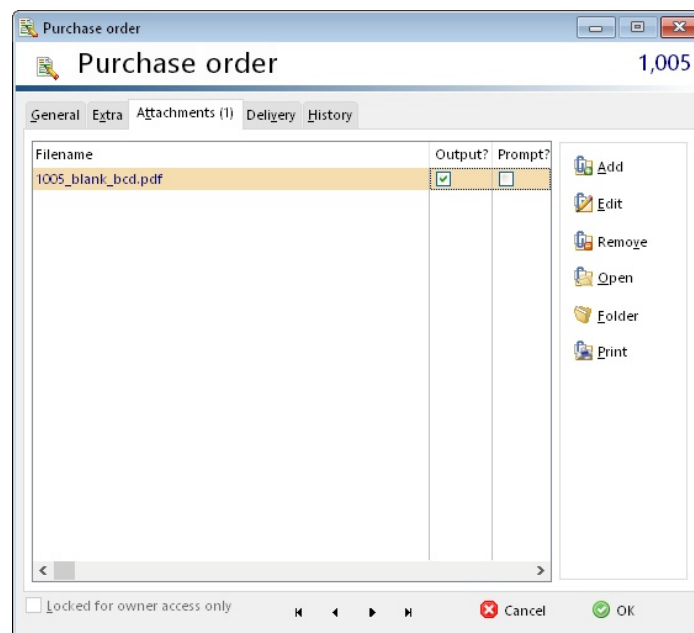


Purchase Order Copying

A common request from purchase ordering module users is to have the ability to copy purchase orders. This is not as easy as it would seem because of the way POs link to orders and therefore the job costing and stock modules. However, it is now possible to copy a PO **if** the purchase order item is not linked to an order. This will make scenarios like stock replenishment for house stocks a lot quicker to process through the PO module.

In instances where a purchase order has multiple items, all items will be copied **unless** they have an order number assigned.

Purchase Order Attachments



After requests from customers, we have added the ability to be able to add attachments to individual purchase orders. This will make it easier to track where PO specific attachments such as artwork or cutter guides are stored as Accura will copy any PO attachments from their original location to the Attachments\Porders folder on the Accura server meaning all Accura users can access the files if necessary. It will also make it easier to output files with purchase orders rather than having to manually attach files to emails. Attachment functionality is exactly the same as in other areas of Accura.



Attaching Artwork to Purchase Order Emails

A new field has been added to Purchase Orders to enable any order attachments marked as artwork to be easily attached to the purchase order email without the need to manually add the attachment to the purchase order itself. This feature is designed to work primarily to attach eDoc artwork coming from AccuraOnline to purchase orders for external suppliers but the functionality can still be of benefit to systems that don't yet have AccuraOnline.

The way the purchase order artwork attachment is best used is by raising the PO when the online order is processed. When this is done, the checkbox at the bottom left of the purchase order, "Output job artwork file(s)" should be ticked. When this is done, any attachments in the order where the Artwork flag is checked will be attached to the PO email as attachments.

Any eDoc attachments are automatically flagged as artwork but other attachments can be marked as artwork if desired and these too will be attached to the PO email.

Purchase order

General Extra Attachments Delivery History

Office: [] To: Data Design Services Ltd Address: Lakesbury Mews, Hittingbury Road, Chandlers Ford, Eastleigh, Hampshire Contact: Trevor Cocks

Supplier: DDS Date: 13/07/2016 Owner: [] Job-no: 0 Required: 14/07/2016 Supp-ref: []

Job-no	Code	Description	Quantity	Rate	Per	% Disc	Net
+	ADHOCS	Custom print, see attached art	2,000.00	£285.50	2,000.00	0.00%	£285.50

Milestone: [] Net: £285.50 Tax: £57.10 Total: £342.60

☒ Output job artwork file(s) [] Cancel [] OK

Order details:1028 - (6)

General Orderitems Sections P-Orders Proofs Attachments (2) Delivery Invoicing User-fields History

Filename	Output	Prompt	Artwork	Copy?	Source
1028_photoshop_reference.pdf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	localhost:3000/system/clients/A
1028_PUBPROD_artwork.pdf	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	http://engine.edocbuilder.com

Locked for owner access only [] Cancel [] OK

If multiple orders are added to a single PO, only the first one, the one that is in the header of the PO, will have any artwork flagged attachments added to the purchase order email.

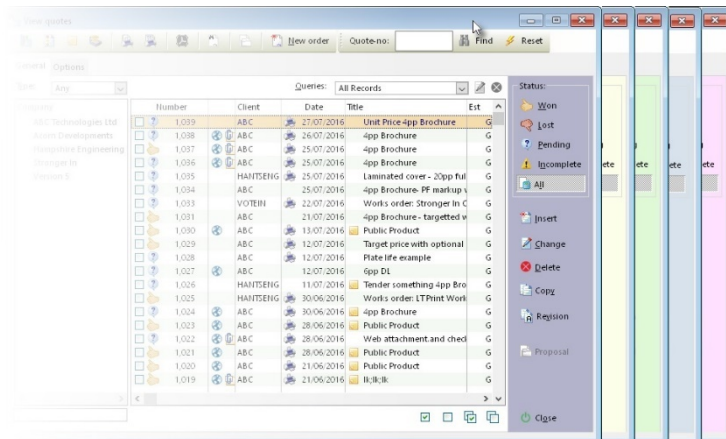
Don't forget, Accura is not aware of the differences between your suppliers so make sure you don't send artwork unnecessarily to your paper supplier!



Theming

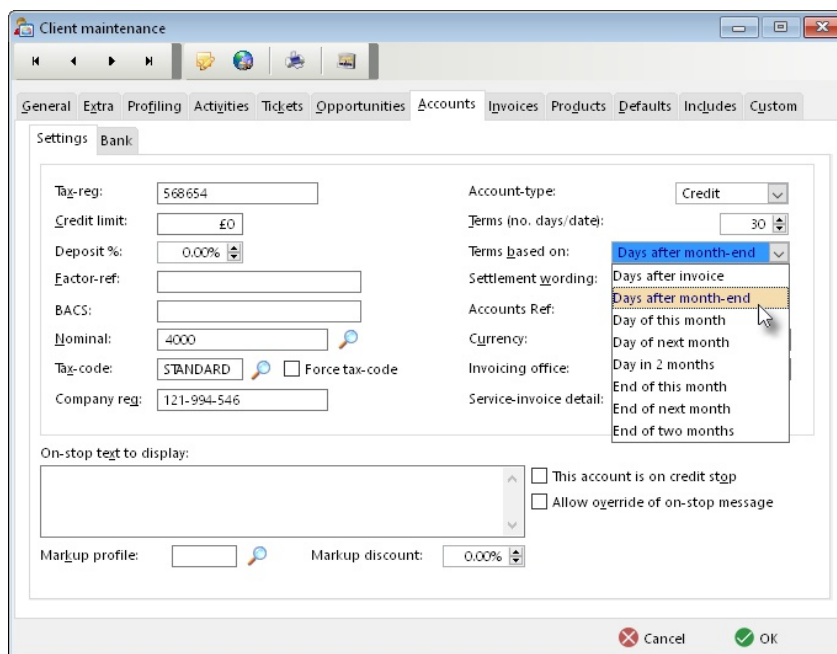
To make Accura a little more visually pleasing it's now possible to add a splash of colour to your workspace. In Set-up - Defaults, so can select a custom colour for the button panel that shows in most browses. This is a local setting so each user can have their own favourite colour.

Button panel colour:



Payment Terms

In previous versions of Accura, it was only possible to set client and supplier payment terms as a set number of days from the invoice date. Accura Version 5 introduces a new range of different payment terms for greater flexibility and better support of various accounts packages.



The new **Terms based on** options works in conjunction with the **Terms (no. days/date)** field which contains a value for either days or date, depending on the setting of Terms based on.

Terms based on	Days / Date definition
Days after invoice	Number of days after the invoice date.
Days after the month end	Number of days after the end of the current calendar month.
Day of the month	Date of the current calendar month.
Day of next month	Date of the next calendar month.
Day in 2 months	Date of two calendar months hence.
End of this month	Last day of the current calendar month.
End of next month	Last day of the next calendar month.
End of two months	Last day of two calendar months hence.

New merge tokens for emails and new fields for report designer are available to support this new functionality.

Dynamic Invoice Output

This new feature allows the output of invoices to be produced in a contact's preferred method. Some contacts prefer to receive a printed copy of their email; others prefer an emailed PDF.

Each contact now has a drop-down option **Send invoices by** and this is the control that governs their preferred response method.

For Accura to know that a contact's preferred method should be used, there is now a new option in the Invoice printing dialog, **As invoice**. For preferred method to work, this must be selected and is a work station specific setting.

It is also possible to change to output method on an ad-hoc basis at invoice level. On the Extra tab of each Invoice there is a **Send invoice by** option which can be changed.



Enhanced CRM Integration

Sometimes during the phases of production it's necessary to set tasks and arrange outcalls and meetings with the client. This would previously need to be done through pop-up notes or in CRM activities which non-CRM users wouldn't be able to see.

Accura V5 introduces a new level of CRM integration to enable better communication between production and customer services. With the changes to CRM licensing introduced in V4.7x meaning all core users have access to CRM and its integral **To Do** list, the CRM module has become more versatile than ever.

Activities can now be linked directly to quotes, orders, proofs and invoices either from within CRM by reps and CSRs or they can now be created from within quotes, orders, proofs and invoices so they can show on, for example, the sales rep's To Do list or any other user with CRM access. There are many potential uses for this new level of integration.

In a CRM activity, there is a new **Linked to** dropdown list where you can select whether the activity is to be linked to a quote, order, proof or invoice. Once your selection is made, you can then browse for the relevant record.

Quotes, orders, proofs and invoices windows each have their own Activity tabs now where all related activities can be viewed. New activities can also of course be created from within these tabs and will automatically be linked to the parent record.



Time and Attendance

For systems that use the optional **Time and Attendance** module, there is a new browse where the data for all users can be viewed in one place with the ability to send all the data to Excel at once.

View attendance data

View data for: All

Name	ID	Title	Email	Shift	Dept	Last-login	at	Station	Current-log
Colin Elmes	CE	Press Manager			Print	01/07/2016	14:18	GAVIN	
Gavin Spooner	GS	Managing Director	gavin@accuramis.com			/ /	00:00		
Mark Lewis	ML	Studio Manager	mark@accuramis.com	DAYS	Studio	01/07/2016	16:38	GAVIN	01/07/20
Owen Newman	ON	Finishing Manager			Finishing	14/06/2016	12:45	GAVIN	

Starting: 05/11/2015 Ending: 05/12/2016

Fullname	Start-date	Start-time	Code	Description	End-date	End-time	Attended-hrs	Paid-brks
Colin Elmes	07/06/2016	17:05	601	Attendance	07/06/2016	17:07	0.03	0.00
Colin Elmes	08/06/2016	09:22	601	Attendance	14/06/2016	14:23	149.01	0.00
Colin Elmes	14/06/2016	15:06	601	Attendance	01/07/2016	14:13	407.13	0.00
Colin Elmes	01/07/2016	14:18	601	Attendance	01/07/2016	15:15	0.95	0.00
Mark Lewis	25/05/2016	10:08	601	Attendance	25/05/2016	16:17	6.15	0.00
Mark Lewis	25/05/2016	12:51	603	Lunch break	25/05/2016	13:15	0.00	0.00
Mark Lewis	26/05/2016	15:06	601	Attendance	26/05/2016	17:07	2.02	0.00
Mark Lewis	01/07/2016	16:38	601	Attendance	01/07/2016	16:41	0.04	0.00
Owen Newman	25/05/2016	14:27	601	Attendance	25/05/2016	16:18	1.84	0.00
Owen Newman	14/06/2016	12:45	601	Attendance	14/06/2016	15:05	2.34	0.00

Notes:

Buttons: Change, Email, View, Export, Print, Close

In a split-screen browse, users are listed in the top half and their attendance and break activities in the bottom half.

Using the **View data for** filter set to **All**, user attendance can be viewed in the bottom half ordered by user - date - time. By using the **Export** option, this data can then be sent to Excel for data manipulation.

This new browse can be found under the RDC menu in Accura.

