



# **Version 5.01 Release Notes**

**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](mailto:support@accuramis.com).

## About This Document

This document details all **minor features, changes and fixes** between the previous public release 4.74 Build 4 and the latest public release of 5.01.

If you are an end user, please refer to the **New Features** document which summarises the major new features likely to be used by end users. This can be found in the Accura help menu under **What's new** These technical release notes are aimed at Accura system administrators, advanced users, and Accura support personnel.

Previous versions of release notes can be found in the Online Resource Area which can be accessed from the Accura Help Menu.

In the text in this document:

- **FEATURE** refers to a new feature that was not available in the last public release.
- **CHANGE** refers to a change in software behaviour from the previous public release.
- **FIX** refers to a bug present in the previous public release that has been fixed in the latest release.



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## Changes in 5.01 Build 10 (9th June 2017)

### General

**FEATURE:** To support regions that use many different tax codes, tax rates are now displayed in the user interface in addition to the tax code. Effected areas are Delivery notes, Sales invoices, Purchase orders and Purchase invoices.

### Order Processing

**CHANGE:** Orders manually changed to Invoiced that had had an invoiced raised but with no delivery note raised would overwrite the order invoiced value with the quote value.

## Changes in 5.01 Build 9 (6th March 2017)

### Estimating

**FIX:** A space at the end of quote quantity text would cause an unhandled exception.

**FIX:** Saving an order could hang Accura if a quote or view quotes browse were open and minimised.

## Changes in 5.01 Build 8 (24th February 2017)

### Purchase Invoicing

**CHANGE:** Purchase Invoices will flag a duplicate number should another PI exist with that number. This flag is purely to bring the user's attention to the existence of a duplicate but they will be able to proceed.

### CRM

**FEATURE:** An order subref column has been added to the CRM Activity Profile - Orders browse

### Accura Online

**FIX:** Improvements have been made to the way proofs sync with Accura Online

### Technical

**FIX:** Various Clarion 10 fixes have been included to improve stability.



## Changes in 5.01 Build 7 (7th February 2017)

### Client and Supplier

**FIX:** Suppliers offices were not being created correctly.

### Email, SMS and Fax

**FEATURE:** New merge tokens have been added for client rep and account manager's personal telephone, mobile and VOIP.

### Purchase Orders

**FIX:** Standard phrase library didn't work with purchase orders and purchase invoices.

### Product Owners

**FIX:** Copying a product that had office owners would sync to the AccuraOnline as being owned by all offices for each client.

### Reporting

**FIX:** Custom reports would show all prices fields in £££s which was not desirable in non-UK markets. All currency symbols have now been removed from custom reports.

## Changes in Build 6 (1st February 2017)

### Estimating

**FEATURE:** A date stamp button has been added to the Quote - Notes specification tab

**CHANGE:** The RFQ window is now resizable meaning it's now possible to view all specification tabs at one time.

### Order Processing

**FEATURE:** A date stamp button has been added to the Order - Notes specification tab

**FIX:** Order item notes would be overwritten if the parent order was updated by the quote.

**FIX:** The application would crash if an email was sent from the View Attachments browse.



## Proofing

**FEATURE:** A note record will now be added to a proof when a proof reminder email is sent.

**FIX:** Proof attachments were not being saved to disk with the correct name when the proof response was synced in from an email.

## CRM

**FIX:** The number column in the RFQ/Quotes tab of CRM Activity Profile was only displaying 5 characters meaning longer numbers were being truncated.

## Time and Attendance

**FIX:** View attendance was available on systems where Time and Attendance wasn't enabled.

## Changes in 5.01 Build 4 (5th December 2016)

### Estimating

**FIX:** Copying a ganged press section was not copying child sections (if any).

### RDC

**FIX:** RDC users could start concurrent activities when their user profile was set not to allow this.

## Order Processing

**CHANGE:** To prevent potential issues with Accura Online, the order Invoice text field is now a required field.

**FIX:** The Invoice text field in an order was not being populated when a Job type was selected meaning delivery notes and invoices could have blank descriptions in some scenarios.

**FIX:** The Accura upgrade program will update order record Specification field to have the same content as the Title field is the Spec field is currently blank. This is done to prevent potential issues with Accura Online.

**FIX:** Negative value order extras weren't being pulled through in sales invoices.

**FIX:** User defined field were not being exported from the Order Sales Analysis window. Due to a Clarion template change, not all fields are exported now.

## CRM

**CHANGE:** CRM default activity is now a required field.

**CHANGE:** If there is no default activity selected for any reason, such as on legacy systems, the first activity listed in the activity table will be used. It is recommended that the system admin selects a suitable default activity in CRM defaults.



**FIX:** CRM activities attached to proofs and sales invoices were remaining in the database when the parent record was deleted.

**FIX:** CRM activities with a code of Proof were being excluded from the activity type drop list when creating an activity in a proof.

**FIX:** CRM activities were not defaulting to the default activity type if an activity had been added on the same thread.

**FIX:** Sending a quote or order contact an email from within the record would not link an associated CRM activity to the parent record.

## Changes in 5.01 Build 3 (24th November 2016)

### Email

**FIX:** Merge tokens that insert recipients in CC and BCC field would prefix the first email address with a semicolon.

**FIX:** Some buttons on the built-in email editor were non-functional due to a change in Clarion 10.

### Attachments

**FIX:** Files attached to template quotes automatically processed by webconsole were not being renamed correctly.

**FIX:** Files attached to blank web quotes that were automatically processed by webconsole as RFQs would not copy when the RFQ was processed into a live quote.

### Purchase Ordering

**FIX:** The "Ignore supplier" checkbox would always be set to true when creating a Purchase Order item.

### Web Console

**FIX:** Clicking the Refresh button under Logs would change the main pane to Activity.

## Changes in 5.01 Build 2 (18th November 2016)

### Estimating

**FIX:** Quote area was not being calculated on quote insert meaning some area-based operations wouldn't calculate correctly.

**FIX:** The Title field on the Detailed Quote Proposal and Acknowledgment layouts would not display. This has been rectified in the shipped versions but customers with customised versions of these layouts will need to go into this field in Report Designer and tick the Resize to fit option in the Extra tab.

### Scheduling

**CHANGE:** The Scheduling Work-to report will now display the order's milestone rather than the event milestone.

**CHANGE:** Scheduling work to list now only prints pending and active events.

### Stock Control

**FIX:** Stock close-off were not generating stock journal activities.



# Changes in 5.01 Build 1 (14th November 2016)

## Client and Supplier

**FEATURE:** Web-enabled contacts now have individual web prepay settings which are available if the parent client is NOT set to prepay in accounts settings.

**FIX:** Client and supplier contacts would disappear from view if another browse was looked up from within the client or supplier update procedures.

## Emailing

**FEATURE:** A Test button has been added to email settings dialogs throughout the software. This button will send an email to the logged-on user so they can check their SMTP connectivity. This option will be greyed out if the email transport is set to MAPI.

**FIX:** The email broadcast integrated spam checkers topped working after the provider changed their required format.

## Tables

**FEATURE:** Labour and outwork operations can now be set up use a range of base quantities as Defaults and Synchronisation values for No. up, Group and Cycles to provide a greater range of flexibility on calculations

The range is dependents on which default is being adjusted and some calculation methods will not allow selection of values at all (fixed, weight, adhoc etc.). These new settings should only be used by advanced users and only when the user fully understands the effect that applied base quantity will have on the working. If there is any doubt, please confer with Accura Support.

**CHANGE:** To support changes the way shipping carriers are now charging, weight based outwork operations now support up to five breakpoints and a thereafter point.

## Estimating

**FEATURE:** The Summary & Analysis page of the quote analysis report now shows a unit price value in addition to the selling price. Unless a unit quantity is specified in the quote, this will by default show a unit value of each.

**CHANGE:** Ignore supplier will be checked by default when selecting table items for outwork tendering to avoid issues when multiple suppliers have been tagged.

**FIX:** Setting the Estimating default for that outwork mark-up method to Department would prevent cost breakdowns from displaying on the Quote / Analysis tab.

**FIX:** Creating a material from the quote section wizard that had a job type applied where print delivery set to Both would not set the material's press delivery value correctly.

**FIX:** Quote proposal letters that had optional extra would print each component of the extra if there were linked operations. The proposal letter now behaves in the same way the quote letter does when printing optional extras.

**FIX:** Quote proposals were only printing unit prices



# Order Processing

**FEATURE:** A function to copy order items has been added for conveniently adding multiple order items of the same material code. This primarily for but not restricted to product orders.

**FEATURE:** Accura now fully supports product ownership. Previously this feature was available but only work for Accura Online. Now when a product is browsed for in an order, the only products that will be display are those where the clients is an owner or those with no owner i.e. public products. In the product selection window, it is possible to override this by checking "Ignore owner" to show all products regardless of ownership.

**FIX:** Dragging and dropping from the phrase library to a Quick Order was broken.

# Proofing

**CHANGE:** Proof external URL values are now stored in the ITM:ExternalURL field. Legacy proof URLs will be moved HDR:ShippingURL during to upgrade to 5.01. The email merge token will also be updated by the accupg program.

**FIX:** Proof response email synchronisation would only sync one response at a time.

**FIX:** Proof email synchronisation could sync in incorrect emails if they had the keywords in the subject line.

# Purchase Ordering

**FIX:** Copied purchase orders that had been invoiced were copying the invoice information across into the new record.

# Stock Control

**CHANGE:** The stock valuation report can now be sorted by both cost price and sell price.

**FIX:** Sorting the stock valuation report would produce an error and not sort the report accordingly.

# Job Costing

**FIX:** The job costing Cost Analysis Report was misreporting the wages element for entries with overtime.

# Invoicing

**FEATURE:** Invoice dates can now be changed en masse from the View Invoices browse. This is done by tagging the required invoice records and clicking the Status change button. A new date is entered here and the invoices will be then processed. The invoice date will then change and the payment required date will then be altered as per the client payment settings. Please note - Only pending invoices that have not been exported can have their dates changed in this way.

# Scheduling

**FIX:** The job number locator would not find an order number if it was not in view in the browse.



## Web Console

**FEATURE:** You can now view attachments before processing quotes and orders. The Details panel is now split into Details and Attachment tabs. From the Attachments tab, you will be able to open and view any attachments before processing the request. However, this should not be used as a substitute for downloading the file.

Attachments that are flagged as eDoc artwork will display an icon to denote this.

**CHANGE:** Sign-up requests from existing clients will display an icon to denote this.

**CHANGE:** Orders have an icon to indicate order-type (works/service and product).

**FIX:** The attachment icon was not being displayed when quotes or orders had attachments.

## Reporting

**FEATURE:** A Print Summary option has been added to various reports throughout Accura. These are

- Quote enquiry
- Order enquiry
- Order - Job type enquiry
- Job Costing - Value added
- Job Costing - Profit summary
- Job Costing - Department enquiry
- Job Costing Operator enquiry

## Miscellaneous

**FIX:** Some version 5 users were experiencing problems with the readability of text in drop down menu due to their operating system.

## Changes in 5.00 Build 5 (7th October 2016)

### Client and Supplier

**FIX:** Owner offices were not being tagged correctly when using the mouse to select offices in the Client maintenance - Products tab.

**FIX:** Office owners weren't displaying their tags in Client maintenance - Products if the tags had been created from Product - Owners

### Template Library

**FIX:** Job type descriptions seen in the Template Library weren't being updated when the parent job type description had been edited.



## Pop-up Notes

**CHANGE:** When a pop-up note entry is read for the first time by anyone other than the note creator, Accura will record who it was, on what date and at what time. These values can be seen in the main pop-up notepad. This will provide traceability on who saw the note and is necessary to support future releases.

**CHANGE:** A new checkbox, Actioned, has been added to pop-up note records. This is a general purpose flag to indicate a note/instruction has been actioned. The user, date and time are also recorded. Notes will display a green tick icon when they have been marked as Actioned.

**FIX:** Note records couldn't be double-clicked to open when the Notepad was opened from the View Client or View Supplier toolbar button.

## Order Processing

**FIX:** Product orders would save themselves if a rogue phrase entry was selected in the Notes field via the phrase dropdown.

## Proofing

**FEATURE:** CRM activities have been added to a tab within proofing. This is so that specific tasks/follow-ups can be assigned to individuals and linked to a specific proof instead of an order as a whole. (Requires optional CRM module)

**CHANGE:** Proof note records have been moved to a separate tab instead of being a button and pop-up. This makes linked notes more visible and as there could be many and crucial ones for proofing in particular.

## Changes in 5.00 Build 4 (23rd September 2016)

## Image Copying

**FEATURE:** The system default logo which is selected in Setup – Program will now ask if a copy should be saved into the Data\Images\Email\Logos folder for use with the HTML Email editor. This copy logo will overwrite the existing ourlogo.jpg. The copying feature will only occur if HTML emailing is selected in the Defaults – Email settings.

**FEATURE:** A user's signature file will now be automatically copied to the Data\Images\Email\Signatures folder and renamed with the format of <userid>.<file extension>.

## Clients and Suppliers

**FIX:** Office entries in the View Clients contact tree were using the wrong icon

## Order Processing

**CHANGE:** For users with stock enabled, the tabs in View Orders have been reordered so that Both comes first and is the default tab.

**FIX:** Online product orders and Accura product orders weren't calculating the quantity and quantity value figures correctly.



# Purchase Orders

**FIX:** Raising a purchase order from a material browse wasn't creating an item for the tagged material(s)

## Changes in 5.00 Build 3 (14<sup>th</sup> September 2016)

### Client and Supplier

**CHANGE:** Contact names are now required fields throughout the application in records such as quotes, orders, purchase orders etc.

**FIX:** The upgrade program was erroneously making the supplierid a unique key meaning some offices couldn't be viewed.

### Estimating

**FEATURE:** It's now possible to view a quote's order from within View Quotes by highlighting a record and using the View Order button from either the toolbar or the right-click menu.

### Order Processing

**FEATURE:** It's now possible to view an order's quote from the order's toolbar button. For technical reasons, this will be view only mode only.

**FEATURE:** It's now possible to open an order's quote from within View Orders by highlighting a record and using the View Quote button from either the toolbar or the right-click menu. Quotes will be editable depending on security permissions.

**FIX:** Order details display would corrupt if specification tabs has custom text and the window wasn't wide enough.

### Stock Control

**FIX:** Deleting a product owner would not remove the record from the UI until the Product window had been reopened.

### Job Costing

**FIX:** Order delivered and invoiced dates could have their values changed by opening and closing related delivery notes and invoices respectively. This would cause orders to appear incorrectly in job costing work in progress.

### Accounts Links

**CHANGE:** QuickBooks and Xero sales invoice exports now have the option to export a transaction quantity as 1 and the unit price as the job price. This will prevent rounding errors between Accura and the accounts package. The relevant option is labelled "Override unit-price".



# Technical

**FIX:** CRM and RDC were not deleting user tagfile records meaning an invalid file structure was detected after upgrading from Version 4x

## Changes in 5.00 Build 2 (6<sup>th</sup> September 2016)

### General

**FEATURE:** It's now possible to use a white theme for Accura. The setting for this can be found in Defaults - General and is a workstation specific setting.

**FEATURE:** Users can now specify line height in Defaults - General which will apply spacing in most browse windows between records.

**FEATURE:** As the Phrases dropdown in Quotes and Orders cannot be used to populate the Title field for technical reasons, a workaround has been added. There is now a small button that when clicked will display all the phrases linked to Title.

**CHANGE:** Accura no longer supports carrier integration with the iAbol API. This functionality will be replaced in a forthcoming Accura release using a more reliable supplier.

**CHANGE:** The "This job / All jobs" drop list filter has been changed throughout the software to a checkbox to increase usability.

**CHANGE:** Send-to functionality, available in many browses throughout the software, now has the option to output to XML.

**CHANGE:** Icons for Microsoft products have been updated throughout the UI.

**CHANGE:** Country formatting has been changed so users can select the country required from a list of 240 countries. When the country name is selected, the Country Code and ISO-Country will be automatically populated. This will help compatibility with 3rd party systems such as PayPal.

**FIX:** The zoom buttons in an image preview window were not the same size as the other buttons.

**FIX:** In Adjust material prices, Adjust labour operations and Adjust outwork registry, the Subcategory filter listed all the blank entries from the related list options.

**FIX:** A long standing issue with the Edit in Place template where scrolling down when there was more than one screen of data would cause a hang has been fixed with the upgrade to Clarion 10.

**FIX:** The move to Clarion 10 means Accura now displays text correctly with Windows Clear Type turned on.

### Security Updates

**FEATURE:** Users can now be prevented from purging SMTP email history by denying them access to the security door SYS:File.

**CHANGE:** RFQs are no longer protected by user access. This means ALL Accura users can raise an RFQ regardless of estimating security privileges.

**CHANGE:** If a user has been denied access to the EST:Update security door, they will only be able to open quotes in View Only mode. View only mode will prevent the user from seeing quotes workings and any other pricing information apart from the sell price.

**CHANGE:** If a user has been denied access to the ORD:Update security door, they will only be able to open orders in View Only mode. This will also prevent the user from accessing the Invoicing tab.

**CHANGE:** The Group security browse has been redesigned to increase usability.



# Email

**FEATURE:** Email broadcasts now have the ability to store custom SMTP settings which will enable clients to send email broadcasts through services such as Mandrill whilst sending everyday emails through their usual SMTP service provider.

**FEATURE:** New internal variables have been added to enable more estimator and owner information to be added to email templates. These new variables are:

Email:EstimatorTel  
Email:EstimatorMobile  
Email:EstimatorVoip  
Owner:OwnerTel  
Owner:OwnerMobile  
Owner:OwnerVoip

In addition to being able to use the variables directly in templates and used in expressions for merge tokens, tokens have been created for each new variable for your convenience.

**FIX:** The email from address field on the Options tab of the Accura email send dialog had resize issues.

**FIX:** Groupmetrics links were not being created for hyperlinks using an https protocol.

**FIX:** The CKEditor HTML plugin had Advanced Content Filtering switched on by default meaning styling and attributes would be automatically removed from some manually entered HTML code. This feature is now turned off by default but could potentially cause problems for emails or HTML copied from other sources into the built-in HTML editor.

# Client and Supplier

**FEATURE:** Window title bar will now change to show the parent client or supplier for a contact or office record when edited.

**FEATURE:** The records displayed on the Invoicing tab in Client maintenance can now be filtered by invoice status.

**FEATURE:** Icons have been added to client and contact records to show whether they are web enabled.

**CHANGE:** Automatically generated order confirmation emails have been changed to work at contact level rather than client level. Contacts that belong to clients that in previous versions had the order confirmation feature switched on will automatically be converted during the upgrade process. Accura users can then turn the feature off for any contact that doesn't require the order confirmation.

**FIX:** The Update Supplier toolbar Office button was non-functional.

# Estimating

**FEATURE:** Paper materials now include a new adjustment to allow for an added percentage of ink usage when the material has a porous substrate. This setting is found on the Estimating tab and labelled "Adjust ink usage for absorption by".

**FEATURE:** Outwork operations can now be linked with materials and labour operations in the same way materials can. Potential uses for this would be when outwork requires work when it is returned from the supplier or applying a weight adjustment using a zero-cost material for processes such as outwork lamination or foiling.

**FEATURE:** Web enabled template quotes and volumes now display an icon in the Quote Template Library.

**FEATURE:** RFQ details can now be populated from a previous order by using the "Use order" button at the bottom of the RFQ window.

**FEATURE:** The Move/Copy to Library dialog now has a job type field to support the new relationship between library volumes and job types. However, whereas a volume is mandatory as it has always been, a job type is not.

**FEATURE:** A new text field has been added to the Report Designer to enable unit prices to be calculated and displayed on a quote letter when using a pricing unit of Job. To utilise this new feature, the text field LOC:UnitPrices should be added to your estimate layouts.



**CHANGE:** Quantity suffix is now not just for padding/book quotes or RFQs. A suffix can be applied to any sort of quote and are user definable in List Options.

**CHANGE:** Tagging terminology used in the Quote checking window has been altered to avoid user confusion.

**CHANGE:** Selecting a Job type in an RFQ will preselect that job type when browsing for a quote template.

**CHANGE:** The Weight label in the Quote Analysis report was fixed to kilos which is incompatible with markets that use Imperial measurements.

**FIX:** Plate life wasn't being taken into account for work and turn quote sections.

**FIX:** Tender PDFs weren't being created for clients with quote checking enabled.

**FIX:** Quotes copied from those relating to product order would retain the stock code value which would then pull through to any subsequent orders.

**FIX:** Accura would crash if Quantity text 1 was replaced with a <space>

**FIX:** Using the "Print one quantity" option when printing a quote letter would still show option extras for all the quote quantities.

**FIX:** Pop-up notes attached to RFQs would not copy across to quotes when processed if a template was attached or selected.

**FIX:** The Reset button for the quote number locator field in View Quotes did not work.

**FIX:** The Reset button on View Quotes Options tab did not reset the Office field.

## Order Processing

**FEATURE:** In progress orders in the Order Tracking status window will display their current milestone on the tooltip which shows when hovering on an order.

**CHANGE:** Order - Extra tab has been removed in favour of sub tabs on the General tab

**CHANGE:** There are now separate settings in View Orders - Options for grouping deliveries and invoices where previously both transactions were controlled by one setting.

**CHANGE:** The order user defined number fields 1 and 2 now support up to 4 decimal places. The default ORD:UserNumber1 and 2 fields available in Report Designer have been updated to include 2 digits after the decimal point. Users who require 3 or more places just need to change the 'picture' of each field in layout designer. Please contact support if you are unsure how to do this.

**CHANGE:** It is now possible to select a nominal code in Order points and Delivery note items. This allows greater flexibility for clients who invoice delivery notes and use nominal codes for billing.

**CHANGE:** If a department was erroneously selected in an Order, it was not possible to select a blank option to reset the field. A reset button has now been added. This reset will also reset any milestone that has been selected so care must be taken not to reset a valid value.

**CHANGE:** The order deposit field has changed from a 5.2 format to 7.2 meaning it will now accept 7 characters before the decimal point.

**CHANGE:** The Order Checking browse will now ask for a confirmation before processing tagged orders.

**CHANGE:** The Select table items window will now open on the department currently selected on the Orderitems tab rather than always default to "All".

**CHANGE:** Orders raised from a quote with a target price will now prompt the user whether they wish to add the price of any optional extras to the sell price. Previously the original target price would be retained regardless.

**CHANGE:** When Optional Extras were displayed whilst processing an order in previous versions, any linked child items would also show. This could lead to user confusion and items not being included. The new behaviour means that child linked items will not be displayed in the Optional Extras dialog but will be tagged in the background and automatically added as order items. A prompt will then be displayed to advise the users of what has been added.

**FIX:** Changing the invoicing office in an order was not updating the delivery address field after the user had confirmed the update prompt.

**FIX:** Notes weren't popping up when copying an order although the original note was being copied forward.

**FIX:** Converting a quote that had an outwork tender note would pop-up a blank notepad window when the order was generated.

**FIX:** Product quick orders were allowing the selection of delivery points.

**FIX:** Order attachments were not being copied with an order that itself was a copy.



# Proofing

**FEATURE:** A Return by time field is now available in Proofs. Users who wish to use this on layouts should add the field HDR:RequiredAt. A new email merge token will be created for this field during the upgrade. Some clients requested this as proofs can be due back the same day but at a later time.

**FEATURE:** A proof action icon has been added to the Proofs browse tab within order details.

**FEATURE:** Proof Acceptance notes can now be prevented by sending a proof PDF when the proof note is email. Some users feel that attaching the proof note is superfluous as all the pertinent data is contained within the email itself. This setting is found on the General tab of the Proof acceptance print dialog window. Other proof attachments will be unaffected.

**CHANGE:** The External URL field in Proof notes is now an entry field which will give the user the option of saving the entry for future use.

**CHANGE:** The View Proofs window has been redesigned to present a much cleaner view.

**FIXED:** Subsequent proofs after the first when raised in a batch would not write data correctly.

**FIXED:** Creating a second proof in a batch would previously not clear the client code cause a client mismatch when selecting an order.

# Deliveries

**CHANGE:** The View Deliveries browse has been changed to a multi-tab format to make it easier to view Service or Product delivery notes. Previously a drop-down list was used to change between Service, Product or Both.

**CHANGE:** Delivery Notes will now print product order items in stock reference code order (MTL:Code). Previously, delivery note items were listed by the database field orderitemid.

# Sales Invoicing

**CHANGE:** Marking invoices as checked in View Invoices will now prompt for confirmation before processing.

**FIXED:** Adding a second order with order extra to an invoice that already contained an order with an order extra would display multiple "Add Extras" prompts.

# Job Costing

**FEATURE:** View Costing Orders browse now includes a milestone filter on the Options tab.

**CHANGE:** Outwork related job costing entries will change date if the date on the parent purchase order is changed when the Update WIP outwork costs default is set to Purchase order.

**CHANGE:** Material and Outwork batch entry forms have been redesigned to match the Timesheet labour entry form for greater clarity and consistency.

**CHANGE:** For systems with the optional Stock Control module, View Costing Orders is now split into order types with tabs for Service Orders, Product Orders or Both. This replaces the order type filter previously on the Options tab and should prove to be more intuitive and convenient.



## RDC

**CHANGE:** RDC will now enforce a restart if the security user is changed. This will ensure that any change in security privilege will take immediate effect.

**CHANGE:** Order select windows throughout RDC now have the client name as well as code to enable easier location of orders.

**CHANGE:** Accessing Accura's Online help from RDC will now open the resource area on the RDC page.

**FIX:** Online resources didn't open in an Accura web browser.

## CRM

**FEATURE:** All CRM users can now create RFQs regardless of their Estimating security privileges.

**CHANGE:** The main CRM toolbar has been improved to make what each icon represents clearer.

**CHANGE:** The Outlook tab in activities will only display if Outlook synchronisation is turned on in CRM defaults

**CHANGE:** Notes fields throughout CRM have been changed to mirror the way different priorities show as different colours as they do in Accura. Areas that have changed include Ticket details, Opportunity details, View prospect profile, To-do list.

**CHANGE:** A set of CRM report layouts have been produced in Letter format (8.5" x 11"). Prospect labels have not been reconfigured as standard sizes for US, Canadian and Mexican markets are unknown. Customers with specific requirements for Prospect labels should get in touch with support for guidance.

**CHANGE:** The Action button pane in the Diary Planner has been replaced with a more modern design which is more compatible with C10 and also more visually pleasing.

**CHANGE:** A note icon will now display in View Campaigns if a campaign has a note.

**CHANGE:** New Prospect Wizard has had a cosmetic overhaul.

**CHANGE:** View Prospects has been redesigned to make it more consistent with similar browses and to fix various resizing issues.

**FIX:** The icon displayed against tickets with an Urgent status has been resized and changed throughout CRM and Accura.

**FIX:** The Help menu 'Call Support' button didn't open a dialler window.

**FIX:** The Campaign - Analysis button was inoperable when the campaign had been closed.

**FIX:** Issues with contact selection in service tickets have been resolved.

**FIX:** CRM labels would not filter when applying a query to the contact list.

**FIX:** The List options button in CRM - Defaults was non-functioning.

**FIX:** Some CRM activities wouldn't always be recorded against an opportunity's campaign.

**FIX:** Quote follow-up activities could remain active in certain circumstances.

**FIX:** Opening and saving an order from within an opportunity would appear to remove all the opportunity details.

**FIX:** The number locator on the RFQs/Quotes tab didn't work when the tab was toggle to show RFQs.

**FIX:** Copying a service ticket would not copy the client forward into the new ticket when done from the View Activity Profile - Tickets tab.

**FIX:** The New Order and Process buttons would show in the View Prospect Profile - RFQs/Quotes tab when there were not valid records to process.

## Purchase Ordering

**CHANGE:** Purchase Order invoices will now prompt the user to add a note (if required) when a PI is placed on or taken off query. Previous behaviour would just open a blank pop-up notepad.

**CHANGE:** The Purchase Order update status function now has the default value of Unchanged so milestones can be changed without effecting the PO status.

**CHANGE:** The date range fields on the View Purchase Order window have been moved to the Options tab due to issues with resizing the browse.



# Stock Control

**FEATURE:** Web enabled products now show an icon in View Products

**FIX:** In previous versions, it was possible to 'deliver' a works order for a stock controlled product that did not have a parent order. This could leave inconsistencies in the stock control module leaving scenarios where the On-Order figure for the WO could never be resolved without using a stock journal.

**FIX:** The sub-category filter in View stock database would list the blank list options for all departments if the main department filter was set to All.

**FIX:** Products entered manually into the products table would not populate the MTL:SellUnit field in the database meaning the sell unit couldn't be seen in View Products. The upgrade to Accura Version 5 will correct bad legacy data.

# Scheduling

**FEATURE:** The Planner's order browse now features a Milestones filter which filters the orders based on Milestones reached.

**CHANGE:** A select button has been added to the View Shift browse for use when called from the Update Resources window

**CHANGE:** The Milestone drop list has been removed from the Update Event window to avoid user confusion.

# Accura Online

**FEATURE:** It's now possible to upload and change your Online logo at any time. Previously, banner changes would need to be done by Accura Support.

**FEATURE:** New Quote and Order request are now created directly from the main navigation bar by hovering over the relevant entry and selecting the desired option.

**FEATURE:** Proof files that are in PDF format will show as a thumbnail on Accura Online instead of as a generic PDF icon.

**FEATURE:** Specification fields for blank quote and order request are now displayed as drop down lists with the exception of Finishing options as these can have multiple options,

**FEATURE:** Specification fields for blank quote and order request can be assigned a default value to display in their respective drop down lists. As Finishing can have multiple options and are not displayed as a drop down, more than one option can be selected as a default.

**FEATURE:** System defaults for Telephone, Fax and Email now sync from Accura and are displayed on the website's home page and on the main header or footer (theme specific). In addition, the new Accura social media fields are also synced out and displayed.

**FEATURE:** Custom pages can now be linked to specific clients.

**FEATURE:** Users can add an image in their account settings.

**FEATURE:** Quote and Order views have a choice of user controllable layouts – Grid, List or Detailed.

**FEATURE:** Proof and Store views have the choice of user controllable layouts – Grid or Detailed.

**FEATURE:** Optional price threshold for users whose orders require approving.

**CHANGE:** Order view is no longer split into Print and Store order tabs, both types of order are now viewed in the one browse.

**CHANGE:** Quote and Order templates are no longer listed in an accordion. Instead they are listed in a grid view. As job types from Accura synced from. When a job type is clicked on, it's then possible to filter the window by volumes that belong to that job type. This replicates the recent change in the Accura template library

**CHANGE:** Improved Sign-up form requiring full contact details for non-clients.

**CHANGE:** Removal of reliance on Adobe Flash plug-in which prevented proper support for tablets and mobile phones

**CHANGE:** Improved validation providing coloured prompts and text messages directly linked to the values that fail validation



# Web Console and Web Monitor

**CHANGE:** Blank quotes automatically processed as RFQs will now notify the nominated internal users, depending on the notification options used.

**FIX:** Cancelling the selection of a hot folder or sound file would remove any existing path.

**FIX:** Non-stock controlled products did not sync to the website correctly during a full web console sync.

## Technical

**FEATURE:** A keyboard shortcut (CTRL + SHIFT + P) has been added to display procedure and dynamic link library references as a tool for Accura Development and Support.

**FIX:** PayPal email links sent from Accura were not formed properly when in Sandbox mode.

