



Version 5.21 Release Notes

Build 9 compiled on 22nd March 2018



Introduction

Welcome to Accura Version 5.21

Version 5.21 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 does 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 5.21 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 document details all **minor features, changes and fixes** between the previous public release 5.01 Build 10 and the latest public release of 5.21.

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 5.21 Build 9 (22nd March 2018)

General

FIX: Client and contact queries used in the Quote Purge browse would not resolve and cause the app to hang.

Order Processing

FIX: Order delivery points would not inherit the correct item weight value when created through imports.

Stock Control

CHANGE: Stock labels were prefixing the item-ref barcode with the material code.

CHANGE: Stock item refs have been increased from 15 to 25 characters.

RDC

CHANGE: The Item-ref field in the RDC material issue wizard has been changed from a drop-down list to an entry/lookup field. This enables the field to be populated by scanning a stock label with a barcode scanner.

Deliveries

CHANGE: The label size control has been removed from Shipping defaults as it is no longer relevant.

Invoicing

FEATURE: Invoice unit price settings are now a per client setting which can be turned on and off in the Client maintenance - Accounts tab.

FEATURE: New fields have been added to the report designer for invoices:

HDR:Taxable - Will print the total net price of all taxable invoice items

HDR:NonTaxable - Will print the total price of all non-taxable invoice items

HDR:Shipping - Will print the total net price for all shipping invoice items

ITM:UnitNet - Will print the unit price for the invoice item

ITM:Unit - Will print the unit per for the invoice item

ITM:UnitPer - Will print the numerical unit per value

FEATURE: New merge tokens have been added for invoice emails:

[InvoiceTaxable]- Will print the total net price of all taxable invoice items

[InvoiceNonTaxable] - Will print the total price of all non-taxable invoice items

[InvoiceShipping] - Will print the total net price for all shipping invoice items

FEATURE: A new invoice layout "Standard - unit price" has been added. Existing users can import this into Report Designer from the Invoices.tps file in the ReportLayout folder on the Accura server.

CHANGE: Validation on nominal invoices will now display a warning if the tax amount is different between the Detailed and Printed tabs. Previously validation was only performed on the Net amount.



FIX: Product invoices were not pulling item descriptions through.

Changes in 5.21 Build 8 (8th March 2018)

General

CHANGE: Sales and purchase order item tax rates are now editable to allow a manual override of the calculated rate.

Estimating

FEATURE: RFQs can now be given the specification of a previous quote, just as it previously could from template quotes and orders.

FIX: The app could crash when changing the quantity text in a quote then tabbing off the field.

Order Processing

FIX: Product Quick Orders would allow selection of multiple delivery addresses which is unsupported.

FIX: Specification tabs were hidden in Quick orders.

Sales Invoicing

FIX: SPTXT fields were not displaying on invoice PDFs when the output was set to email or PDF.



Changes in 5.21 Build 7 (20th February 2018)

General

FEATURE: Job type default field values now support spec text.

FIX: A generic issue when using keyboard location searching has been corrected.

FIX: The Phrase library scroll bar was missing.

FIX: Client level default field values for spec text fields were not working.

Estimating

CHANGE: Quote contact name is now displayed in View Quotes.

CHANGE: When using order specification in an RFQ, the previous job number will be written to the Private tab.

FIX: The All same and Row Same buttons in Adjust Mark-ups needed to be pressed twice before they would work.

FIX: A rogue drop down list was showing on the Weight field when selecting a material.

FIX: Plate overs were being calculated twice when there was more than one section type.

Order Processing

FEATURE: It is now possible to view an order's invoice record and PDF copy from the Invoicing tab of an order

FIX: Converting a quote for a sub-office to an order would not use the sub-office address or contact when no client defaults were set for delivery contact or office.

FIX: Orders that include a tool could have specification tab text overwritten depending of which tab the tool spec text was assigned to.

Proofing

FIX: Proof auto-sync was only checking for new emails for one cycle.

Stock Control

FEATURE: The stock valuation report now has the option to Ignore if zero on-hand meaning that when ticked, stock balance records with zero on-hand will not be printed.

FIX: Stock balance imports for reel materials with a cost unit of Weight were calculating using the reel weight for the record weight instead of kg or lb.

FIX: Stock balance totals for materials with an On Hand Bought Forward would be incorrect.

CRM

FIX: Opening a quote follow-up from the To Do list would only be in read-only mode.

FIX: The Primary contact's details were being listed for each contact in the Prospect database



Accura Online

FEATURE: It is now possible to specify which compatible list options can be synced with Accura Online. The website syncs list options such as contact prefix (Mr, Mrs, Miss etc.), contact position (Managing Director, Marketing, Estimator etc.), delivery method (van, courier, overnight etc.), product group and product subcategory. These now have an option to be Visible on website.

CHANGE: The change in the previous build to make product tax code a required field has been reversed.

CHANGE: The behaviour of automated emails from web console has been tweaked slightly. Automated emails will always be generated using fall-back addresses for automated functions within web console when there is no other specified recipient.

FIX: Changes to tax rates or currencies would not trigger a sync with AccuraOnline.

FIX: Due to a fault in a 3rd-party template, domain links would be removed if a domain record was opened in view-only mode.

FIX: Product orders linked to quote templates that contained no workings would be linked to an erroneous orderitemid.

Technical

CHANGE: Quote and order XML now includes <sectionid> for sections, workings, layers and orderitems.

FIX: An issue where Accura performance slowed as time went on has been identified as a Windows 10 update issue. Microsoft has since issued a patch that resolved this. Affected users should ensure that a Windows 10 update with the knowledge base number#4056892 is installed. NOTE: This was NOT an Accura fault but a Windows 10 issue. All versions will have been affected not just the latest versions.

Changes in 5.21 Build 6 (5th February 2018)

Estimating

CHANGE: The press options selection screen will no longer display when editing a press in the section wizard.

FIX: Plate overs were not being removed when a new overs profile that didn't specify plate overs was selected.

FIX: Additional plate overs were not being calculated if the section's plate type had a plate life value and extra life cycles were triggered.

FIX: Manually adjusting a section's number of plates would not increase or decrease the number of plate overs.

FIX: The RFQ preview PDF would not be updated when editing the RFQ until the record had been saved.

Stock Control

FIX: Issuing materials through Accura or RDC material batch window was not possible if stock tracking was not enabled. The same problem would occur on systems with stock tracking enabled and the material being issued was a product.

FIX: RDC material wizard and material batch windows in Accura were not enforcing selection of item-refs in systems using stock tracking.



Accura Online

CHANGE: Tax code is now a required field in products. Tax code is necessary to give accurate pricing in Accura Online for product orders.

CHANGE: The automatic sign-up feature has been changed to give more control. There are now three options -

- **Process sign-ups manually** - all sign-ups will need to be processed by a user.
- **Process sign-ups automatically if the contact exists** - a contact will be processed automatically IF their sign-up email address is already associated with a contact within Accura.
- **Process sign-ups automatically for any contact** - all contacts will be processed regardless of whether they already exist in Accura. Furthermore, if a sign-up is for a client that doesn't yet exist, the new client and contact will be created.

CHANGE: Automatic sign-ups will use the web console admin address to send a notification of the record processed.

FIX: Web orders with a custom address were using the default delivery address when being processed in web console.

FIX: Specification fields for single product service orders were not being populated from the template quote.

Miscellaneous

FIX: The Select an order browse used throughout Accura wouldn't return any results when the tab was set to Both and the Status filter set to All.

FIX: Users denied the EST:Target door could still target a quote price by opening the quote history window.

Changes in 5.21 Build 5 (26th January 2018)

General

FIX: Print on quote letter and job ticket controls in Tabs were not working correctly. **NOTE:** These settings control only LOC:TabText/LOC:TabPrompt and TAB:TextValue1 - 30 - i.e. dynamic spec fields. They will NOT control any fields with the SPTXT prefix.

Client/Supplier

FEATURE: Clients with an account type of Prepay are now denoted in View Clients and other places throughout the UI by a \$ icon.

Email

FIX: The Accura send dialog was hidden when a system was using the MAPI email method.

Import Export

FIX: Material imports were setting the invoice required flag to True.

FIX: Specification fields (fields prefixed with SPTXT) were not available for selection in an order export.

FIX: Specification fields in quote and order XML output were not being populated.



Estimating

FEATURE: The field QTE:ExpectedOrderDate is now available for use in the quote summary and working wizard reports.

FIX: Quotes using a unit price and a commission rate applied would only display quantity 1 cost and sell rates.

Order Processing

FEATURE: LOC:TabPrompts and LOC:TabText text-fields are now available for selection in job sheet and work sheet layouts.

FIX: Drag & drop from the phrase library to the order delivery notes field was not working.

FIX: Creating a product order for a pre-pay customer from the Product tab of View Orders was not generating the create invoice prompt.

FIX: Emailing delivery notes and invoices with more than one line-item could produce two emails in certain scenarios.

FIX: TAB:TextValue fields 1-9 would not print on job sheet layouts.

Purchase Ordering

FIX: The PO search facility in Purchase Order Receipts was not working.

Stock Control

CHANGE: Raw material stock maintenance now uses the same cost unit drop list as the material maintenance. Previously it was not possible to see the buy-in unit from this window.

FIX: The stock balance batch reference field was not being populated.

FIX: Stock balance records for materials ordered in non-numeric values (CWT, Area etc.) would have an incorrect weight value.

CRM

FEATURE: The Activity profile browse has been redesigned to make it more consistent with other browses.

FEATURE: An "Include inactive accounts" filter has been added to the Activity profile browse.

FIX: Credit note invoices were not showing as negative values in the Invoices tab of CRM Activity Profile.

FIX: CRM Defaults were using the SYS:File security door. this has now been changed to the CRM:Tables door.

Accura Online

FIX: Notes added to a product order by an end-user were not being pulled through into the Accura order when it was linked to a template quote with a job type.



Technical

FEATURE: A Google API field has been added to the System Information window. This key should ideally be obtained on a per system basis for those wishing to use Google maps. By customers using their own API, they will be able to track usage. A Google account is necessary and once an API is obtained in <https://console.developers.google.com/apis/dashboard>, Google Maps Embed API should then be enabled, <https://console.developers.google.com/apis/library/maps-embed-backend.googleapis.com/>. This key will potentially be used in other future features where Google services are required.

CHANGE: The accupg utility will use log out and commit when processing webtasks which should make the upgrade procedure quicker.

Changes in 5.21 Build 4 (15th December 2017)

General

FIX: Text in quote and order specification tabs would not change size if the system font size was altered.

Estimating

FIX: Commission plans where the first break point used 0% would use the Thereafter rate when a quote quantity fell in this range.

RDC

FEATURE: A Department drop-list has been added to the user selection pane of the RDC console. This enables the user list to be filtered by the usual department value stored in each user's RDC settings in user maintenance. This will enable quicker selection for users when there are many RDC user in a company.

Order Processing

FIX: Removing the delivery client value would repopulate the field when changing to a different field.

Purchase Order

CHANGE: It is now possible to copy to clipboard purchase order item descriptions that open in read-only mode.

Stock Control

FIX: A products MinSellQty value was being set to the same as the SellPer value on systems without Accura Online. It will now default to 1.

Accura Online

FIX: Non-works-order web product orders were not generating invoice spec text which would trigger the required field validation on the invoice spec field.



Changes in 5.21 Build 3 (12th December 2017)

General

FEATURE: It is now possible to re-order the sequence of items on change order, delivery notes and invoices.

CHANGE: The View Quotes and View Orders search by "Contains" has been changed to look at the entire quote or order spectext record rather than the QTE:Spec or ORD:Spec values.

CHANGE: Office related layout fields are now available to be added to address label layouts.

FIX: Browse windows called from Defaults or CRM Defaults would open behind the parent window.

FIX: Cancelling a new keyword entry would prompt to add a record to the database.

FIX: Order based reports had an entry for TAB:TextValue27 missing.

Client and Supplier

CHANGE: The function to email account handlers with details of changes to their clients has been changed from an always-on function to a client specific function. This way account handlers can keep track of specific clients rather than all of them. The default for each client is off, this can be changed in the client Accounts tab - Notify account handlers of status changes.

CHANGE: To maintain data integrity with 3rd-party applications such as accounts packages, certain client, contact and office fields are now protected by the Acc:Tables security door. This will mean users who are denied access to this door will no longer be able to change client code, address and Sales-rep values IF the client type is Client or Both. If the client type is Prospect, the user will still be able to edit these settings, depending on other prevailing security settings.

CHANGE: Client mail merge will now use a contact's office address data rather than always using the default client office.

Import/Export

FEATURE: Office fields are now available in the contact export. When these fields are selected, they will populate with the contact's office data else the details for the default office will be used.

FIX: Material CSV imports were not automatically setting the CostQuantity1 value to 99,999,999 if no CostQuantity1 had been specified in the import file.

Email, Fax and SMS

FIX: Merge tokens that used explicit quote and order fields were not converted to use the new spec text fields. The Accura upgrade will update all default tokens to use the correct fields. User defined merge tokens will need to be manually updated.

Estimating

FEATURE: The dynamic text fields LOC:TabPrompts and LOC:TabText are now available to use on quote proposal layouts. The default proposal layouts Detailed and Acknowledgment have been updated to use these dynamic fields rather than static prompts and fields.

FEATURE: The quote history feature now incorporates a function to 'back-fill' prices should quote workings be re-analysed but the previous prices is still required. The user should note that because workings have changed but the original price has been retained, using this function will remove any mark-ups and the quote pricing method will become targeted.



CHANGE: The behaviour of the optional extra and itemised layout fields in Estimate layouts has been improved to allow for line wrapping. Customised layouts that use LOC:LineItemText should be amended to remove static text that refers to "Your price includes".

CHANGE: The Unit-price and Price/1000 tabs in the quote graph analysis are no longer available when the quote only has one quantity. This is because these tabs plot a line against quantities and it is not possible to plot a line when there is only one reference point.

FIX: Adjusting a quote's profit or value-added percentage would change each quantity, not just the one being adjusted. This would only occur if a commission plan had been applied to the quote.

FIX: The "Ignore tool size" flag setting in the tool/cylinder selection window was not being retained.

FIX: Tender specification when using the Re-tender button was not using updated specification text.

FIX: Creating consecutive RFQs would delete the specification tab from the first created RFQ.

FIX: Removed quote quantities would still be visible in Advanced material options.

FIX: Quotes over records that were created by operations linked to materials were being duplicated when sections were opened and resaved.

FIX: Commas were being added to quote specification text when a spec tab was not populated.

Order Processing

CHANGE: Depth and width bleed values now support up to 4 digits after the decimal place to bring them in line with the corresponding values in sections. Custom layouts that already use these fields may need the pictures adjusting to incorporate the extra digits.

CHANGE: Order status filter icons have been made slightly darker to improve visibility.

FIX: Converting a quote to an order where the quantity text did not start with a numerical value was generating the wrong quantity selection window.

FIX: When copying an order and selecting in a different client, the address was not populating correctly.

FIX: Order specification fields were not printing on production labels

FIX: Tool information was not being added to the order specification tab.

Invoicing

FIX: Batch quick invoicing from View Orders would create separate invoices if the same address was used but one or more of the orders had no office code value.

FIX: Invoicing an order where the invoicing office is a sub-office would add incorrect address details in the invoice header.

Purchase Ordering

FIX: The client contact drop list was not populated when the Client option was chosen in the Delivery tab of a purchase order.

Stock Control

CHANGE: Product pack weight is now a required field in order to support delivery charges.

Scheduling

FEATURE: Scheduling events can now be purged. Purging old events will improve the boot time of the Planner. This feature can be found in the File - Purge menu in Accura. Only events whose parent orders are fully delivered and invoiced will be purged up to and including the specified date.



Job Costing

FIX: Job costing material batch selection window would always default to the Paper department. It now always defaults to the All options as in previous versions.

CRM

FEATURE: The Prospect activity profile window now contains a filter to be able to search through activities by their parent types. If activities are linked to quotes, orders, proofs or invoices, a Parent type can be set, then a record browsed for.

FEATURE: Order tracking by Department is now available by the right click menu in the Orders tab of the Activity Profile window.

FEATURE: A read-only version of the Scheduling planner can now be accessed from the CRM menu bar under Schedule. (Scheduling module required) **NOTE:** CRM must be reinstalled for this to be enabled.

CHANGE: It is now not possible to amend a quote follow-up record from within the parent quote. This is due to the technical difficulties of supporting the functionality that is usually triggered by changing the status of the quote follow-up activity.

FIX: CRM activities could display an incorrect task type when raised from certain windows.

Accura Online

FIX: Some users would need to log on to web console when launched from Accura's web menu.

FIX: Quote PDF uploads to Accura Online would fail in certain circumstances.

FIX: Web service orders with online delivery charges were not calculating correct prices at invoice stage.

FIX: Quote, order and proof delete web tasks were failing.

FIX: If a web order delivery charge order item had no weight, the delivery charge could not be calculated correctly leading to invoicing discrepancies.

Technical

FEATURE: The accupg utility now supports a command line parameter to increase the amount of records accupg keeps in memory before committing to disk. This will allow Accura engineers to set a higher number of records than the default 750 when it is deemed server resources is able to support this. The syntax for the command line is *accupg commit=1500* where 1500 is the number of records processed before committing.

NOTE: This will only show a speed improvement on the record processing section of accupg, not the FM3 segment. The command line should only be used by Accura Support engineers.

FIX: The way the installer handles the installation and removal of the ID Automation font has been changed to prevent barcode layout fields from being disassociated from the font.



Changes in 5.21 Build 2 (16th November 2017)

Estimating

CHANGE: The estimate layout text field, LOC:Prices, will now dynamically change to be either tax inclusive or exclusive based on the quote's display tax setting.

CHANGE: The text field LOC:Net has been added to the list of available text fields so users who wish to can display separate columns for LOC:Net, LOC:Tax and LOC:Total on their estimate layouts.

FIX: Copying an RFQ was not copying specification tab text.

FIX: The cost price on quotes with outwork where the system setting for outwork markup was set to Department would be incorrect. In this scenario now, Outwork will not be listed separately in Analysis but each outwork cost will be included in the department totals

FIX: Estimate Analyses weren't showing unit price breakdown.

Purchase Orders

FIX: The office list was not returning any results when a Purchase Order was being delivery to a different supplier

FIX: The Contact field in the Other selection for the Purchase Order - Delivery tab was obscured by the Address field.

Stock Control

FIX: Group filter in View Products was not displaying any list options.

CRM

FIX: Users who were denied the CRM permission "View CRM data created by other users" would get an error when opening View Prospects

Accura Online

FIX: Delivery notes and invoice PDFs were not getting uploaded to Accura Online



Changes in 5.21 Build 1 (10th November 2017)

Estimating

CHANGE: The overs breakdown in Advanced material options now displays the running overs percentage that is being applied to each quantity.

Stock Control

FIX: It was possible to create stock journals for non-stock controlled products.

Changes in 5.20 Build 8 (3rd November 2017)

General

CHANGE: The XML option in print preview dialog has been removed.

CHANGE: File attachment browses now default their File type drop-down to "All Files"

CRM

CHANGE: The way CRM activity attachments work has been overhauled and they now work in the same way as attachments do in other areas of Accura.

Stock Control

CHANGE: The Stock type control in stock materials and products has been converted to radio buttons

Web Console

CHANGE: The user interface in web console has been updated to a more modern look.



Changes in 5.20 Build 7 (27th October 2017)

General

- FIX:** Opening and saving certain windows would make Accura flick to another open application and back again.
- FIX:** It was not possible to delete a custom tab that had no child tablinks records.

Client and Supplier

- FEATURE:** Client and Supplier browses have a new category filter.
- FEATURE:** Contacts and contact office links can now be created and maintained through CSV office imports. New contacts need to have their parent office code in their CSV record and only the contact's name, phone, fax and email can be created. Phone, fax and email can be updated by a subsequent CSV import. Again, the office code will need to be in the record but the contact name must also match otherwise a new contact record will be created. If the office primary contact is updated via CSV import, the matching office fields will also change to match the contact details.
- FEATURE:** The mapping and route planning function is now available directly on the View Client, View Prospect, View Client Offices, View Supplier and View Supplier Offices browses via a toolbar button and an option on the right-click menu.
- CHANGE:** To support legacy operating systems, the Accura internet browser was set to emulate Internet Explorer 8. At some point during Google Maps development this started causing issues with Accura's map and route planning feature. Accura will now set the IE emulation based on the host operating system. Users on legacy operating systems will find that maps and route planning will not work correctly if at all. It is recommended all Accura PCs run Windows 10.
- CHANGE:** The "Is Residential" flag that was previously on the map and routing interface has now been moved to the Client, Supplier and Office maintenance windows. This makes the feature more reliable and is needed for future functionality.
- FIX:** An internal client related ID was not being set correctly on new clients meaning it would be impossible to select an accounts office into client maintenance.
- FIX:** An internal client related ID was being incorrectly set by the accupg program during an upgrade meaning accounts offices would not be pulled into invoices correctly.
- FIX:** The Subcategory drop down in the Select Product browse when called from client maintenance was not working. This was an underlying problem in Clarion 10 and could potential caused problems throughout Accura which should now be fixed.

Estimating

- FEATURE:** View Pending RFQs now features a Respond button which will generate an email to the RFQ's originator any issues with the request can be clarified.
- CHANGE:** The number of decimal places used in an internal variable when calculating profit mark-up curve has been increased to increase accuracy for larger quantities and pricing breaks.
- CHANGE:** Users will now be asked to confirm a quote section delete.
- CHANGE:** The Quote Proposal User field has been renamed to Signatory and reconfigured to now be populated with the client's default signatory.
- FIX:** Running overs quantities were being calculated as raw sheet values when the overs strategy was based on Running Sheets.
- FIX:** An optional extra that had no quantity would cause other optional extras in the same quote not to print their prices on the quote letter.



FIX: Selecting a library template into an RFQ would retain unwanted quantities.

FIX: The system email address was not being populated in quote based layouts

Order Processing

FIX: Works orders were not using the parent product order's delivery address which could cause confusion on the shop floor.

FIX: Changing the status of an order in View Orders would cause Accura to move behind another open application.

FIX: Inserting a manual order item was setting the mark-up value to -100% meaning this would calculate a sell price of 0.

Purchase Ordering

FIX: Sundry-type purchase order items would display seemingly random description text.

Stock Control

FEATURE: Multiple products can be web enabled/disabled by tagging them in View Product Database then using the Web-toggle option in the right-click menu.

CHANGE: The initial field focus of a stock or product material window has been changed to Subcategory from the Stock-type field to prevent accidentally changing of this field.

CHANGE: Products with quantity choices will have their minimum and maximum sell values determined by the values of the quantity choices.

CHANGE: Products that have no maximum sell quantity will have this value set to 9,999,999.

FIX: Entry of a thereafter figure was being enforced in products meaning it was impossible to set up a zero-cost product.

CRM

FEATURE: Suppliers can now be viewed from within CRM via the Prospect menu.

Accura Online

CHANGE: Works order quotes and orders will no longer sync to the website to prevent end-user confusion. During the upgrade, web tasks will be generated to remove all existing works order quotes and orders from the website.

FIX: Contact web tasks were not being correctly generated for non-web enabled contacts.

FIX: Print orders were not syncing values for depth and width.

FIX: The web monitor application program would not retry web tasks if the server was offline.



Changes in 5.20 Build 6 (7th September 2017)

General

FEATURE: Default field values now includes a Usage notes section to allow notes to be made on more complex field value setups.

FEATURE: The main toolbars in Accura and CRM can be set to a variety of size in their respective Default - General settings.

FIX: The accupg application was resetting custom tab settings for required tabs to their defaults when updating from an earlier version of 5.20 Beta.

FIX: Email dialogs generated from within other procedures were allowing operation of the toolbar in the parent procedure that could lead to unexpected results.

FIX: Opening and saving a default field value was removing the field name value and preventing saving.

Estimating

FEATURE: Estimating Defaults now has an Overs Basis selection that applies to quotes when an overs strategy has not been selected or manually overridden.

CHANGE: When re-tendering an outwork operation in copied quote, the original supplier will no longer be automatically tagged.

FIX: Ink materials were being added to sections multiple times.

FIX: Changes to Width and Depth in a cylinder-type tool were not being retained.

FIX: The Material column in a quote's section was not display the full material code if it was over 15 characters.

Order Processing

CHANGE: A print button has been added to the View/amend change orders browse.

Proofing

FIX: Recording a response to a proof would change the header record's status as Complete but leave the corresponding item record's status as Pending.

FIX: Updating a proof response was not regenerating the associated proof XML file.

FIX: Some proof related fields were missing from proof XML files. These included Milestone, Proof response fields and External URL.

Purchase Ordering

FIX: Outwork purchase order items were using the table description, not the order item description.



CRM

FIX: Copying quotes and orders from within CRM was not copying the sections and workings correctly.

Import/Export

FIX: Purchase invoice due-date field was always the same as the invoice date value in the Xero export format.

Changes in 5.20 Build 5 (8th August 2017)

General

CHANGE: Various icons throughout the user interface have been updated.

FIX: The Send-to function would post an error after printing or cancelling the print preview.

Estimating

FIX: An RFQ's Rep value could be lost when converting to a quote.

FIX: Press linked materials, labour and outwork were not being pulled through into quotes.

FIX: Commission rates wouldn't display for new quantities added to a quote until it was saved and reopened.

FIX: Private notes being pulled through by a default setting in the Private tab setup would populate quote specification tabs that didn't already have text when a job type was applied.

FIX: The show tax button was not always working correctly on the quote Analysis tab

Order Processing

CHANGE: When copying an order and re-quoting, the user will be prompted if they want to use the quote's specification text or the original order's.

FIX: Invoicing an order would change its UnitPer value.

FIX: Editing an order item in a product order could change the sell price when tabbing across columns.

Purchase Ordering

FIX: Outwork purchase order items used the wrong job specification text when the 'Use full order job specification for purchasing' setting was enabled in the outwork item.

CRM

FIX: The tool tip in Activity profile that would appear when hovering over a record was not working correctly. It now only displays when hovering over the Subject column, doesn't required a record to be highlighted and will trim the text displayed if there is too much to display comfortably.



Accura Online

FIX: Services orders raised for single basket item products were not copying the specification text from the template quote.

FIX: Product order items on store orders were not numbered correctly. The ACCUPG patch will re-synchronise the history of store orders during the upgrade to resolve this.

Changes in 5.20 Build 4 (14th July 2017)

General

FIX: The Select Table Items browse would corrupt when switching to the Options tab.

Client and Supplier

FEATURE: View Clients and View Suppliers can now show all contacts for all records when "Primary contacts only" is unticked. This means column-sorted keyboard location can be used for all contact records making it easier to find specific contacts.

FIX: Custom queries in View Clients using CON fields would not resolve.

Estimating

FEATURE: Overs profiles now have a setting to add extra material for each plate in a section.

FIX: Quitting Accura when a quote needed re-calculating and saving would cause the application to loop.

Order Processing

FIX: The header bar of a Quick Order would not resize correctly.

FIX: Recording a milestone in a proof response wasn't updating the parent order's In Department field.

Stock Control

FIX: Manually ordering works-order products were not creating stock records or creating the order as a works order.

FIX: Copying and cancelling a stock material or product could create a rogue table entry.

FIX: Products linked to template quotes were not using the quote run on price as the thereafter rate

CRM

FEATURE: Activities raised after completing another can be unlinked from the parent record i.e quote by using the reset button.

Import/Export

FIX: Xero export date formats were hard-coded to DD/MM/YYYY meaning Xero versions that require other date formats would reject the import files. The Xero format now using the Windows locale to format dates.



Changes in 5.20 Build 3 (19th June 2017)

General

CHANGE: We have updated our network communication library DLLs and added new options to some browses to address certain issues presented by using Office 365.

CHANGE: The Send-to template has been updated and now includes more export options.

CHANGE: US and Canadian translation files have been updated.

FIX: The 'Use an overs profile' hotspot was too large in the Defaults – Estimating

FIX: Selecting a job type into a quote or order after the specification tabs had been populated would blank out the specification values.

Estimating

CHANGE: Two quote workings fields have been renamed – QTW:Rate is now QTW:CostRate and QTW:Total is now QTW:Net. Customers who use these fields in custom Accura workings reports or ODBC queries will need to amend field names accordingly.

FIX: Quote proposal item records were not correctly formed and so layouts using the ITM:Description field would print incorrect information.

Order Processing

CHANGE: The order section material browse has been changed to the select table items format.

FIX: The View Attachments - Folder button wasn't working when the window was called from Update Change Order.

Deliveries and Invoicing

FEATURE: Fields have been added to the Report Designer to support the new number of pallet fields in delivery notes and delivery note items, HDR:NoPallets and ITM:NoPallets.

FIX: Service-type delivery notes and invoices would print two pages regardless of the number of items.

Purchase Ordering

FIX: Purchase Invoice validation was including the current record in the validation routine.

Stock Control

CHANGE: When linking a product to a template quote, Accura will offer to assign pricing as per the linked quote.

CHANGE: When linking a product to a template quote the price sync is chosen, Accura will set the cost per and sell per to match the quote's unit price. If the unit price is job, the per fields will be set to the first quantity of the quote.

FIX: Products were having their minimum pack quantity set as the pack quantity value which could be an issue for non-Accura Online users as this field would not display in the UI.

FIX: Products linked to template quotes will now offer to synchronise quote prices when changing the cost per or sell per values.



CRM

FEATURE: There is now a button to view the order linked to a CRM service ticket in view-only mode.

RDC

FIX: The activity progress bar in the RDC console was not working.

Time and Attendance

FEATURE: The Attendance report now has the option to display users who have no data in the specified date range to allow for calculation of holiday and sick pay.

AccuraOnline

CHANGE: Post-upgrade synchronisation of data to Accura Online has been changed from one 'syncall' webtask to individual webtasks to prevent overload of bandwidth.



Changes in 5.20 Build 2 (30th May 2017)

General

FIX: Some field labels for overs types in Defaults - Estimating weren't aligned correctly with their entry fields.

FIX: A rogue mark-up rate record could be created when switching a mark-up profile to use multiple rates.

Client and Supplier

FEATURE: It's now possible to view client and supplier office notes from their respective browses by clicking the Notes button.

FIX: Clients who had no contact marked as the primary contact would not display in View Clients.

Estimating

FIX: Phrase drag and drop to quote specification was not working as the spec fields were not switching focus correctly.

FIX: Quotes specification text was not retaining any changes after the quote was first created.

FIX: Copying an RFQ was displaying debug messages.

Order Processing

FIX: Reprinting a job sheet could clear the order record of the next order in the database.

FIX: Copying an order with a unit price would not set the unit per correctly on the copy.

FIX: The Attachments browse when called from a Change Order was displaying all non-order related attachment records.

FIX: The "Print this line item" label in a Change-order item window was unreadable.

CRM

FIX: CRM activities tab was available in Quotes and Orders on systems that did not have the CRM module enabled.



Changes in 5.20 Build 1 (18th May 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.

FIX: Changing the default email template wasn't retained when saving the Defaults window.

FIX: It wasn't possible to copy a Volume as an auto-increment error would be posted.

FIX: The Print button on the pop-up notepad would cause a View Open Error

FIX: Copying a job type would not copy auto-includes or field defaults

Tables

FEATURE: Tools can now have quote specification text. A new field has been added to a tools Extra tab.

FIX: Importing tools into the material database was setting an incorrect base quantity for each record.

FIX: Inactive materials were showing by default in the Adjust Material Prices window. Now they will no longer display unless the "Include inactive items" checkbox is ticked.

FIX: Copying an ink material and removing the rate would retain some of the cost information that was not editable in the UI.

Estimating

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

FEATURE: An ellipsis button has been added to the quote section wizard where the users can easily add a long, ad-hoc section label. This functionality is in mind for systems that may use unique section labels. To this end, these ad-hoc labels are not stored in the database.

FEATURE: A Send To option has been added to Quote - Notes tab.

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

CHANGE: The way Optional Extras print on the estimate layout have been changed to use two fields instead of one. This will improve the layout of the Extra on the estimate layout. The LOC:Extras field should be replaced with LOC:ExtrasText and LOC:ExtrasPrices.

CHANGE: The origination field LOC:OrigPhrase is now available to be used on quote proposal layouts.

FIX: Custom press speeds could be reset to the default on certain circumstances.

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

FIX: Trying to close a minimised quote or RFQ would hang the application.

FIX: It was previously not possible to copy quote workings that were marked as an optional extra.

FIX: The open attachment button in an RFQ would open the attachments parent folder rather than the attachment itself.

FIX: Mark-up profile expiry validation was not working correctly in certain situations.

FIX: If a tender email was cancelled and the quote text amended and the tender regenerated, the PDF would retain the original quote spec text.



Quote Library

FEATURE: Creating a quote from the Quote Template Library now starts a new thread for each quote. This means that now it is possible to drag sections from other library quotes to the new quote to quickly build new quotes. Previously this was not possible as the new quote would open on the same thread as the library.

CHANGE: Quote template quotes will no longer be numbered by using the internal quoteid number and instead using a sequential number stored in the system configuration file as other record numbers are.

CHANGE: The Quoteid column in the Quote Template Library has been replaced by a Reference column which displays the new template number.

Order Processing

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

CHANGE: The Numbering tab in an order has been moved away from the main specification area the top-right sub-tabs. This is done for technical reasons pertaining to the new user definable tab functions.

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

CHANGE: Outwork operations that have the 'Outwork item used as click-charge' flag set to true will no longer print on the job sheet layout.

CHANGE: Various improvements have been made to the way sub-office contacts are selected in order related records.

FIX: The client type filter was not greying out the clients list when set to Any in View/amend change orders browse.

FIX: The status filter in View/amend change orders was a radio button selector instead displaying status icons.

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

FIX: The status filter in View/amend Change Orders browse was non-functional.

FIX: Invoicing a different amount to a job's quantity value would change the order's unit price value. The unit price value should always remain constant regardless of invoiced quantity.

FIX: Copying an order would set the pack quantity back to the system default value rather than retain the original's value.

Proofing

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

FEATURE: View Proofs now features a proof number locator similar in function to those found in other browses.

CHANGE: The proof acceptance note window has been redesigned to make the artwork area clearer.

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

FIX: Proofs could be saved with no description which could cause issues with Accura Online.

Deliveries and Invoicing

FIX: The Delivery Wizard 'Create one delivery note per location' function was not working correctly.

FIX: The client browse format in a Sales Invoice's Delivery tab was incorrect.



Purchase Ordering

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.

FIX: Creating a purchase order from within a material or stock view when the material had no default supplier would delete the purchase order item when selecting in a supplier.

Stock Control

FEATURE: The database field MTL:Imagefile has been enabled in the Report Designer to allow product images to be printed in order-based reports such as product acknowledgment and pick lists.

CHANGE: Stock allocations will now round to 2 decimal places instead of 4 to match stock issues and thus avoiding discrepancies.

FIX: Closing off an order that had no outstanding allocations would not remove that order from the stock close-offs window.

Job Costing

FEATURE: The job costing approval wizard now features a "Stock-close off order" checkbox which will enable any outstanding stock allocations to be zeroed out when the approval is saved.

FIX: The Job Costing Work in Progress print dialog Query Wizard was missing in the version 5.01 release.

CRM

FEATURE: A Follow-up notes field has been added to the Prospect activity profile browse.

CHANGE: Campaign, Opportunity and Ticket print dialogs would need to the user to select records after applying a filter. Now the report will print only the records returned after applying a filter.

FIX: The To Do list priority filter would change to Low if the View Orders browse was opened.

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

FIX: Assigning a quote to an existing order would not mark the Quote Follow-up activity as Complete.

FIX: Follow-up activity status would be left as To Do when a revised quote was converted to an order.

FIX: Changing the status of a revised quote to Lost was not closing off the quote follow-up activity.

FIX: Orders made from revision quotes weren't generating a CRM Order activity record.

FIX: The date was not appearing correctly in CRM appointment planner.

FIX: The email template designer couldn't be opened from a standalone CRM.

RDC

FEATURE: The RDC context menu now has an action to allow users to view an order's attachments.

FIX: A pop-up note added to an order through the Scheduling tab of the RDC console would not be saved to the database correctly.

FIX: Orders could be corrupted by RDC users using the Scheduling tab and Notepad functions in a certain order.



Time and Attendance

FEATURE: User records now support a 9-character employee number. This field is available in the Layout Designer and can be added to customisable user reports.

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

Accura Online

FEATURE: Quote, Order and Signup requests now show which domain they originated from.

CHANGE: Order icons in Web Console could be confusing so now only product orders will show an icon

FIX: Materials created through the Stock menu would not validate on the description field which could cause potential problems in Accura Online.

FIX: Formatting text on the Web tab of a product would cause the entire HTM file to be removed from disk.

FIX: Products could be linked to template quotes that had an Incomplete status which could cause problems on the website. This behaviour has now been prevented.

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

FIX: It was previously possible for a material to be uploaded to the website with no description value.

FIX: Proof delete web tasks were not being created correctly.

FIX: A check on template quote status is now performed on when a product that is linked to a quote is synced to the website. If the linked quote has a status of Incomplete the upload will fail.

A list of other features, changes and fixes in Accura Online can be found in the Version Info page in your website's Admin area.

Technical

CHANGE: Specification fields have been removed from quotes and orders and move to their own set of tables. This process is done automatically during the accupg stage of an upgrade. This change will significantly reduce the size of the quote and orders table and potentially make browses on network databases quicker to scroll as the data-packet sizes will be reduced.

CHANGE: Topscan.exe has been reverted to the C6 version to improve usability.

FIX: Header record print dialog windows now display records using the ReferenceNo key which resolves issues where records were sorted in alphanumeric order instead of numeric order.

ACCURA SUPPORT ONLY:

Topscan mass update syntax for Office IsLocal flag based on Postcode example:

`CHOOSE(INLIST(OFF:Postcode[1:2], 'SO', 'PO', 'BH') > 0, 1, OFF:IsLocal)`

MYSQL syntax for similar update:

`UPDATE offices set local = 1 where postcode like 'SO%' or postcode like 'PO%' or postcode like 'BH%';`

