



# **Version 5.41 Release Notes**

**Build 8 compiled on 18<sup>th</sup> July 2019**



# Introduction

## Welcome to Accura Version 5.41

Version 5.41 is the latest release for the Accura MIS and introduces a unified codebase shared with the in-development SQL version. Using this new coding method should have no impact on customer systems but will significantly accelerate the new back-end version.

All clients with a current support contract for Accura (and Accura Online 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. Accura Online 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** in Accura and Accura Online since the last major public releases, which were Accura 5.40 Build 2 and AccuraOnline 5.33.

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 Accura 5.41 Build 8 (18th July 2019)

### Estimating

**FIX:** Quote auto-include window was not displaying when a client was selected in the quote.

## Changes in Accura 5.41 Build 7 (17th July 2019)

### General

**FIX:** Browse searches where the search string contained an apostrophe would return a View Open error.

**FIX:** The currency ISO code field was not being populated which could cause an auto-increment error when entering a new currency. If the user doesn't specify an ISO code, it will be assigned from CUR:Mapping or CUR:Currency in that order

### Estimating

**CHANGE:** The quote Round price checkbox has been moved to the Analysis – Costs tab beneath the Mark-up field for greater ease of use

**CHANGE:** Pre-trim labour code would only previously be added to a section if the raw sheet was cut into 2 for the running sheet. Now pre-trim will be added for 1up jobs where raw sheet is larger than the press max sheet size.

### Order Processing

**FEATURE:** Orders can now be targeted in the client's base currency if their client default "Enter invoice values using target currency" is switched on.

**CHANGE:** Previous QTE:Nominal behaviour when converting a quote into an order would use the job type nominal if one existed, superseding any QTE:Nominal selection. Now, if the quote has a nominal section then this will be maintained on order processing.

**FIX:** Removing a working from a converted quote was not removing the related order item if the user chose to update the order. Legacy data cannot be corrected as we cannot safely determine which order items are affected.

**FIX:** The View Quote button in View Orders was opening the quote record in view only mode.

### Job Costing

**FEATURE:** It is now possible to add an order extra from the View Cost Summary window. There is a new Extras tab where order extras can be added or alternatively, right-clicking on an existing cost entry and selecting "Is-extra" will create a supporting order extra based on that entry.

**FIX:** Adding/editing a material costing entry directly to an order could remove the contact from the order, forcing reselection of the contact.

### Sales Invoicing

**FIX:** Rounding issues between HDR:Total/HDR:Tax and HDR:CurrencyTotal/HDR:CurrencyTax now resolved.



# Changes in Accura 5.41 Build 6 (26th June 2019)

## Estimating

**CHANGE:** It is now possible to target a quote price in the customer's preferred currency.

**FIX:** Previously generated quote tender PDFs in an Accura session were being added to all subsequent tender emails.

## Layouts

**FEATURE:** STA (Stock allocation) fields have been added to the stock labels layout. This enables users to run the stock tracking label on purchase order receipt stating STA:Order, STA:Qty, STA:Description. Helpful if stock has been ordered specifically for a job to easily identify it.

## Invoicing

**CHANGE:** Users can now target a currency cost from within an invoice line item with "Enter values in client currency" checked

**FIX:** Order warnings were not being correctly generated when creating invoices containing multiple orders. The "Include extras invoice" prompt now displays only once and will either add all extras for all orders or none at all depending upon response. Creating this prompt multiple times was of dubious value anyhow as it required the user to know what extras were in the order.



# Changes in Accura 5.41 Build 5 (20th June 2019)

## General

**CHANGE:** Currencies, Tax Rates and Nominals (GL Codes) are now grouped under an Accounts sub-menu in the main Accura Setup menu option.

## Estimating

**FIX:** Quantities in an RFQ were not being populated by the quantities of any parent quote, template or order.

## Import/Export

**FEATURE:** XML orders export file now includes two new entries. The field "Version" which details the number of revisions of each order and another called "OrderDateTime" which formats similar to an SQL entry as: yyyy-mm-dd hh:mm:ss.

## Order Processing

**FIX:** The Quote button in the Order Status window was not available.

## Email, SMS and Fax

**CHANGE:** The CKEditor 'Advanced Content Filtering' feature has been disabled to allow for a greater range of HTML and CSS tags and attributes to be used in email templates.

## Security

**FIX:** A Manager Override prompt was displaying for some users when trying to access various areas of the software.



# Changes in Accura 5.41 Build 4 (4th June 2019)

## Client & Supplier

**CHANGE:** Client shipping default method will now use a costing method of outwork for carrier and labour for driver selections.

**FIX:** Selecting a contact through UpdateOrder, UpdateQuote, UpdateInvoice would not cross reference the client for that contact and update the desired client selection appropriately.

## Estimating

**FIX:** Processing more than one RFQ in a session would add the PDF attachment of previous quotes to RFQ owner notify emails.

## Delivery Notes

**FIX:** Changing a labour delivery cost value was reverting to the table value on save.

**FIX:** The Delivery Response report wasn't sub-totalling.

## Purchase Ordering

**FIX:** Purchase order line item total would remain the same after amending the quantity by overtyping.

## Stock Control

**FEATURE:** Users now have the ability to output artwork as an attachment where a product re-order method = Purchase Order, with new options available in the product > attachments tab.

**FIX:** Where a web service order would be created for a stock-controlled product. Partially transferring the order quantity to stock and delivering the balance would remove the balance quantity from the "on hand" figure rather than the "on order" figure.

## Invoicing

**FEATURE:** When a multidrop order is invoiced, each delivery extra invoice line item now shows either the postcode, address1, town, or office-code depending on what info has been populated. The location is appended to the outwork/labour extra description e.g. Delivery charge - SO53 5SS

**CHANGE:** When invoicing multiple orders for 1 client and using the grouping facility to show all orders on 1 invoice, corresponding delivery charges would be placed at the bottom of the invoice. This has now been changed to show the order delivery charge below the corresponding order detail on the invoice.

**FIX:** Invoicing a delivery note which contained delivery charges split between multiple orders was not adding the delivery order extras for all of the orders.

**FIX:** Opening the item record of a delivery note before invoicing would prevent the delivery extras from being pulled through to the invoice.





## RDC

**FEATURE:** The Unscheduled RDC tab has had a small redesign to a split browse design to show sections and order items. When an order is highlighted, its order items are shown and these can be filtered by selecting individual sections. Activities started in this manner will not display the Start Activity window as it is unnecessary.

**FIX:** Stopping an activity and selecting a click charge directly after issuing material would set incorrect department values in that activity causing labour activities to show as material activities in job costing reports.

**FIX:** Making a subsequent stock issue against a stock allocation could display a different quantity depending on whether the material code was selected or manually typed in.

## Import/Export

**CHANGE:** The number of characters in the Description fields of sales and purchase invoices have been increased to 255 characters for the Xero export format.

## Accura Online

**FEATURE:** A new timer has been added to the web console timers settings to adjust the frequency active websites users are checked. Setting this timer to 0 means the active user list will never be queried. The web monitor service should be restarted after any change.

**CHANGE:** It is now possible to change the client code of web-enabled clients. This was previously not possible due to technical restrictions.



# Changes in Accura 5.41 Build 3 (22nd May 2019)

## General

**FIX:** Browsing for a client from an existing transaction would not open the browse with the current client highlighted.

## Estimating

**FIX:** Previewing an RFQ was removing any text from the Private field.

**FIX:** The planned size depth would highlight red adjust number out window when the quote section was a reel-type.

## Email, SMS and Fax

**FIX:** The [UnsubscribeHTML] merge token was missing its <a> tags.

## Deliveries

**CHANGE:** Parcel label records will be available in the parcel label print dialog if they had been previously requested but not printed.

## Job Costing

**FEATURE:** Job approval windows now have a Deliveries tab where all related delivery notes can be viewed.

## Invoicing

**CHANGE:** The invoice item tax field has been reverted to being a drop-combo.



# Changes in Accura 5.41 Build 2 (17th May 2019)

## Email, Fax and SMS

**FEATURE:** There is a new supported data type for merge tokens - HTML. This new data type should be used for HTML-heavy merge tokens or those that use HREFs.

**CHANGE:** The return address validation has been improved in the [UnsubscribeHTML] merge token.

**FIX:** Some merge tokens containing HREF or mailto code were broken.

## Estimating

**FEATURE:** Locked RFQs can now be unlocked via the Unlock option on the right-click context menu. Caution should be exercised that no other user is actively processing the RFQ.

**FIX:** An RFQ would lock if a user had opened an RFQ then used the red cross to close the window.

**FIX:** Users were being prompted to select a layout when inserting or editing an RFQ and one had already been selected or inherited from the parent browse.

**FIX:** New materials created from View Materials were not being assigned a tabid value which would in effect break compose quote specs for that material.

## Order Processing

**FIX:** Resizing an order window vertically would obscure the Order close-off checkbox on the Invoicing tab.

## Delivery Notes

**FIX:** Delivery note sell charges weren't being calculated correctly when the linked outwork operation was an ad-hoc calculation method.

## Purchase Ordering

**FIX:** The browse focus would switch to top of the Purchase Order Receipts after receiving a PO.

## Invoicing

**FEATURE:** It is now possible for users to create their own column order in a Sales Invoice using the right-click List Format option.

## RDC

**FIX:** Incorrect on-hand stock level validation could be generated in some circumstances due to material codes being held in-memory.

## CRM

**FIX:** In Activity Profile, the Show my accounts only and Include inactive accounts checkboxes weren't working.



# Changes in Accura 5.41 Build 1 (13th May 2019)

## General

**CHANGE:** The Contact telephone extension field has been expanded from 5 to 10 digits.

**CHANGE:** It is now possible to double click from the email editor window to open attachments in addition to using the "open" button in the right-hand pane of the editor.

**CHANGE:** Due to Google's withdrawal of their Google+ service, all Google+ fields have been removed from Accura.

**FIX:** A long-standing Clarion issue where transaction browses jump when client changed in split browse has been addressed.

**FIX:** Date pickers were not retaining the selected date when they were on the General tab of some browses.

## Email, Fax and SMS

**FEATURE:** It is now possible to import and export merge tokens from the Setup merge tokens browse. This will enable customers to import or update custom merge tokens configured by Accura support personnel.

**FEATURE:** A new email template (DeliveryPOD) and 11 new merge tokens have been created to complement Accura POD and the delivery signature capture facility. This is available for both SMTP and MAPI transport protocols.

**FIX:** HTML reserved characters in the proof response URL would break the email subject line.

## Estimating

**FEATURE:** Previous tab behaviour only allowed the estimator to completely disable the ability to compose or create spec from workings for all tabs displayed in the estimate. Now you can elect to turn off/on this flag from the tab setup menu, so now each tab can display its working spec independent of one another.

**CHANGE:** When an RFQ is processed and the user selects a Template or Quote to populate the quote's sections and workings, they will be prompted whether they want to overwrite the RFQ specification. If they answer No, the new quote will retain the RFQ spec and not inherit that of the template or quote.

**CHANGE:** An RFQ lock has now been added to prevent 2 users from processing the same RFQ with the addition of a lock icon and a dialog prompt from the pending RFQ window.

**CHANGE:** A prompt is now displayed when editing a quote section if the material is using a custom rate allowing the user to retain the custom price or revert to the material's standard price. This feature was in earlier versions of Accura and has been reinstated.

**FIX:** RFQs were not remembering the default printing layout.

**FIX:** The note icon was not showing against a record in View Quotes after adding a pop-up note from within the quote.

## Order Processing

**CHANGE:** The "send-to" function which allows a user to snapshot an area of view and output to excel, PDF etc has now been added to the Order > Delivery > Multi-drop tab. This was only previously available when managing the order points through the multi drop view.

**FIX:** The Order Status report was ordering by office name rather than client name when the Sort by was set to Client.



# Delivery Notes

**FEATURE:** Delivered consignments through EasyPost will now update delivery note status and provide recipient details.

**FEATURE:** Delivery notes can now have a delivered status. This works with the new optional Detrack add-on for when a customer has signed for their delivery (alertmon must be running in order to receive status update).

**FEATURE:** Previously delivery charges which can be added to invoices or costing were outwork based only. It is now possible to setup a labour code for "internal" delivery costs. This can be controlled in Setup > Defaults > Shipping > Invoicing and also on a per instance basis in a delivery note.

**CHANGE:** Delivery wizard will now only show addresses to deliver to within selected criteria of date range AND ORD:Required/ORDP:DueDate

**FIX:** Delivery order points were not being shown through delivery wizard feature.

**FIX:** When re-sizing the delivery wizard window the bottom right hand checkboxes within in were not moving proportionately.

# Purchase Ordering

**FEATURE:** Purchase Invoices now display their exported date on the History tab.

**FIX:** Receiving a purchase order created before the stock installed date could give a negative on-order figure.

# CRM

**FIX:** Follow-up linked activities were not populating with the correct activity type but would inherit their value from the parent activity.

# Layouts

**FEATURE:** New POD fields added to the layout designer: HDR:PODRecipient, HDR:PODDate, HDR:PODTime, HDR:PODNotes. Available in header, footer and form.

**FIX:** Tab text value #30 was not previously visible on the job sheet layout



## Changes in AccuraOnline 5.34 (7th May 2019)

### Delivery Tracking

**FEATURE:** Delivery tracking and proof of delivery displays on the Deliveries tab of Order details. Clicking on the tracking fields opens the tracking URL in a new browser tab.

### Online Store

**FEATURE:** Store filter results or text searches returning an empty product list now offer to display all products, preventing the need to clear end-user browser cookies.

**FIX:** Products client and office ownership was not always working as expected in the store.

### Miscellaneous

**CHANGE:** Google+ social media support has been removed from the website after Google discontinued the service.

**FIX:** Automatic 10am approval reminder emails were sent to all accounts with permission to approve orders when they should be restricted to specific approver accounts.

**FIX:** Due dates in quote and order requests were not saved correctly unless the website time zone was set to GMT.

**FIX:** Resolved empty text values being synced to Accura populated with 'There is no information available'.

