accura™

complete print management system

Version 5.41 New Features

Build 8 compiled on 18th 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 AccuraOnline if purchased) are entitled to receive and install all software releases as part of their support contract benefits. If you have not already done so, please sign up for an account on our website to access protected software downloads, user manuals and other content. AccuraOnline upgrades are distributed automatically when released by Accura support.

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

About This Document

This **New Features** document details all the major features added to Accura and Accura Online since the last major public releases, which were Accura 5.31 Build 4 and AccuraOnline 5.33.

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

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

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

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New Features in Accura 5.41 Build 3

Customer Support Portal

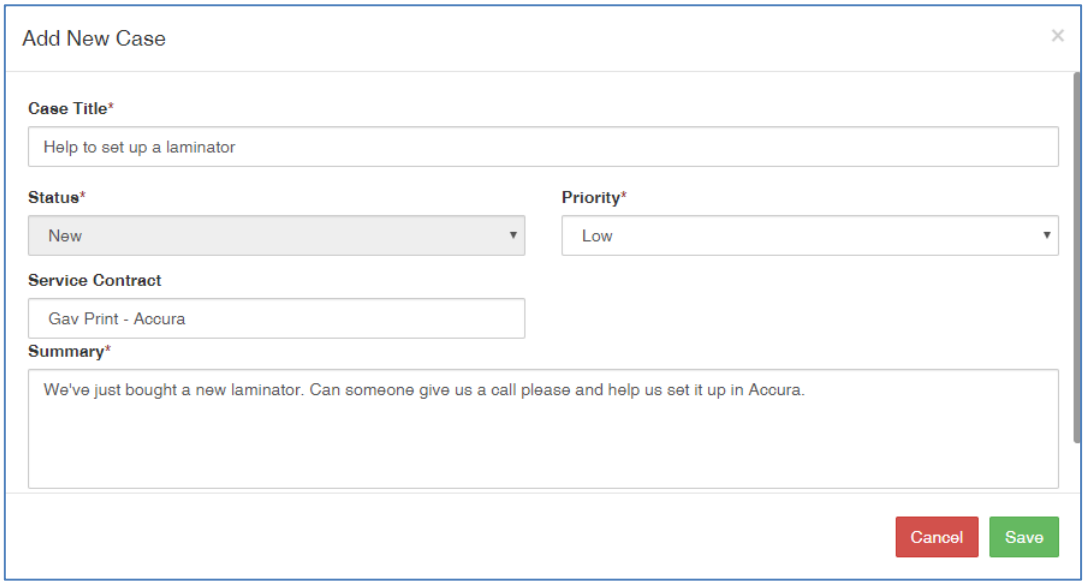
A new feature has been added to Accura to allow customers to log support calls to our Customer Support Portal directly from Accura. This is accessible from a new tool bar icon or the Help menu.

From the portal you can create and review existing support case adding comments and view any related documents. You can also view our growing list of FAQs, quotes, orders and your service contract.

All users in our database should receive an email notification of their web portal id and password. If you have yet to receive your log on details, please contact our support or accounts departments to enable your access.

Raising a case

Raising a case is really just filling out a simple form. Please include as much detail of your query as possible. In the **Service Contract** field, please just type Accura and you should get a match of your current service contract



Once submitted, our support team will receive a notification and your case will be added to the current support log.

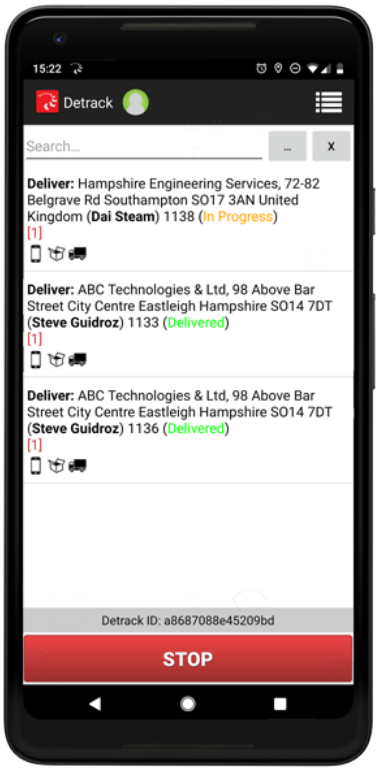
New Features in Accura 5.41 Build 1 and AccuraOnline 5.34

Accura POD

Accura POD is a new paid for module designed to complement the **Delivery** module and provides **real-time proof-of-delivery** and **delivery tracking**.

See here for a demonstration video - http://sales.accuramis.com/eshots/accura_ebulletin_pod.htm

We have teamed up with **Detrack** to give your delivery drivers the same POD functionality that you would only usually expect from major carriers.



The system is very easy to set-up once Accura POD has been purchased.

Simply sign-up for a Detrack account, get your API key and add it to Accura's defaults, add your vehicle information to Detrack then download the app to your driver's iPhone or Android smartphone. You're then ready to go!

If you only have one delivery vehicle, your Detrack account is completely **FREE**. If you have more than one, the first vehicle is still free but there are additional charges for each subsequent vehicle.

For comprehensive details regarding set up of your Detrack account, please visit the excellent Detrack resource page here: https://www.detrack.com/tutorials/

Please get in touch with our sales team direct on 02380240470 or on sales@accuramis.com for pricing and implementation info.

To find out more about Detrack and their pricing structure, visit their website - https://www.detrack.com/.

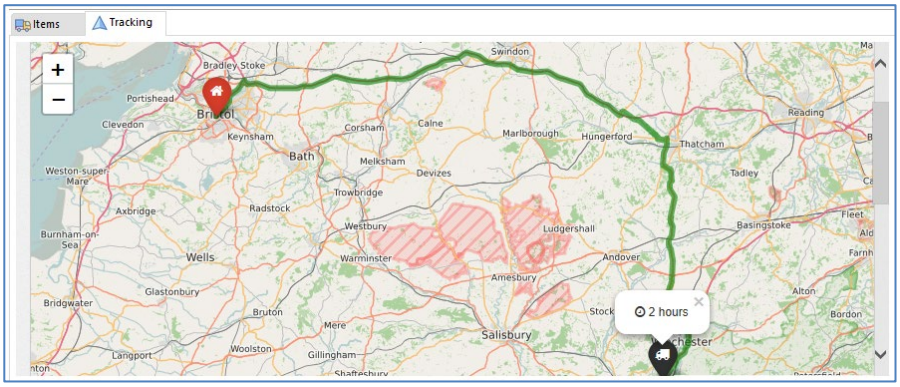
If you are already using the Carrier Integration module with Easypost, then Accura POD will complement this feature beautifully. It may even mean you never need rely on 3rd party software for your logistical concerns regarding deliveries again!

Accura POD allows you to control your all of your deliveries, whether it be an internal fleet of vans or an external courier service all from within Accura.

With Accura POD you can assign email notifications to any status changes/updates regarding your delivery.

These notifications contain a link to the GPS location of your driver, keeping your customers abreast of any updates or traffic related delays to your consignment, one less thing for you to worry about!

In order to receive the full functionality of this feature (status updates, signature capture, GPS updates etc) you **must** have the Accura alertmon service running as a background task on your Accura host PC.
This service polls Detrack for delivery status updates every 5 mins as a default setting, but can be updated from within Setup > Defaults > Shipping > Proof of delivery.
For more information regarding the service please contact Accura Support.



To complement the new Accura POD feature, we have also made some amendments to the delivery note viewing window by adding an icon to the delivery method column which updates dependant on the delivery method chosen.

A new delivery note status of "delivered" has also been added to the delivery note viewing window.
This automatically updates the status to red as soon as soon as that all-important signature has been captured for your consignment from your driver through the Detrack app.

	2614	30/04/2019	16:15	10-B-2267	VC-BR-AVOI	DL	3126	ParcelForce - expres	0	8	3.15	Servic
	2613	30/04/2019	16:10	10-B-2267	VC-BR-AVOI	DL	3126	ParcelForce - expres	0	16	6.30	Servic
	2612	30/04/2019	16:09	10-B-2267	VC-BR-INBR	DL	3126	Accura 7.5T	0	11	161.15	Servic
	2611	30/04/2019	16:07	10-B-2267	VC-BR-INBR	DL	3126	ParcelForce - expres	0	16	234.40	Servic
	2610	30/04/2019	16:04	10-B-2267	VC-BR-FARM	DL	3126	Accura 7.5T	0	16	234.40	Servic
	2609	30/04/2019	16:00	10-B-2267	VC-BR-GEOR	DL	3126	Accura 7.5T	0	11	161.15	Servic

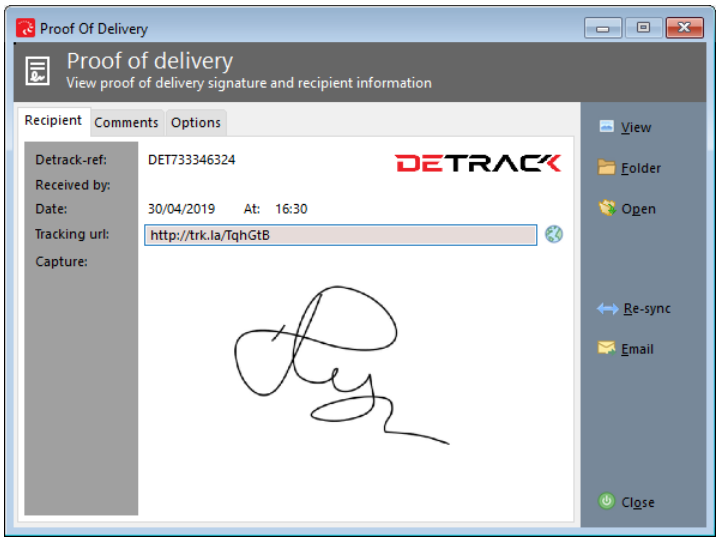
The POD signature can be viewed from the delivery note in the Shipping > Tracking tab.

Once delivered, your customer will receive an automated email notifying them that their consignment has been delivered, along with an image of the captured POD signature (if taken) and up to x5 additional images.

We understand however, that you may wish to easily resend this information on request.

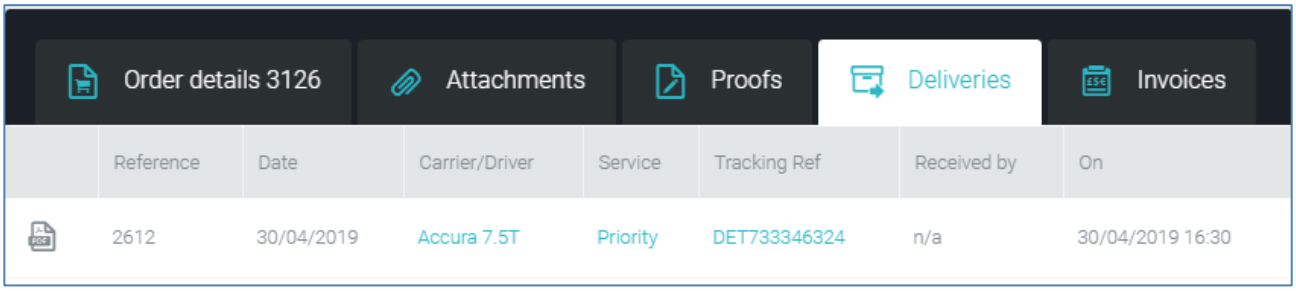
To facilitate this, we have added the ability to quickly send an email from the tracking area of the delivery note with the "Email" icon.

Shipped with version Accura 5.41 build 1 is a new email template called "DeliveryPOD" along with 11 new accompanying POD prefixed merge tokens.

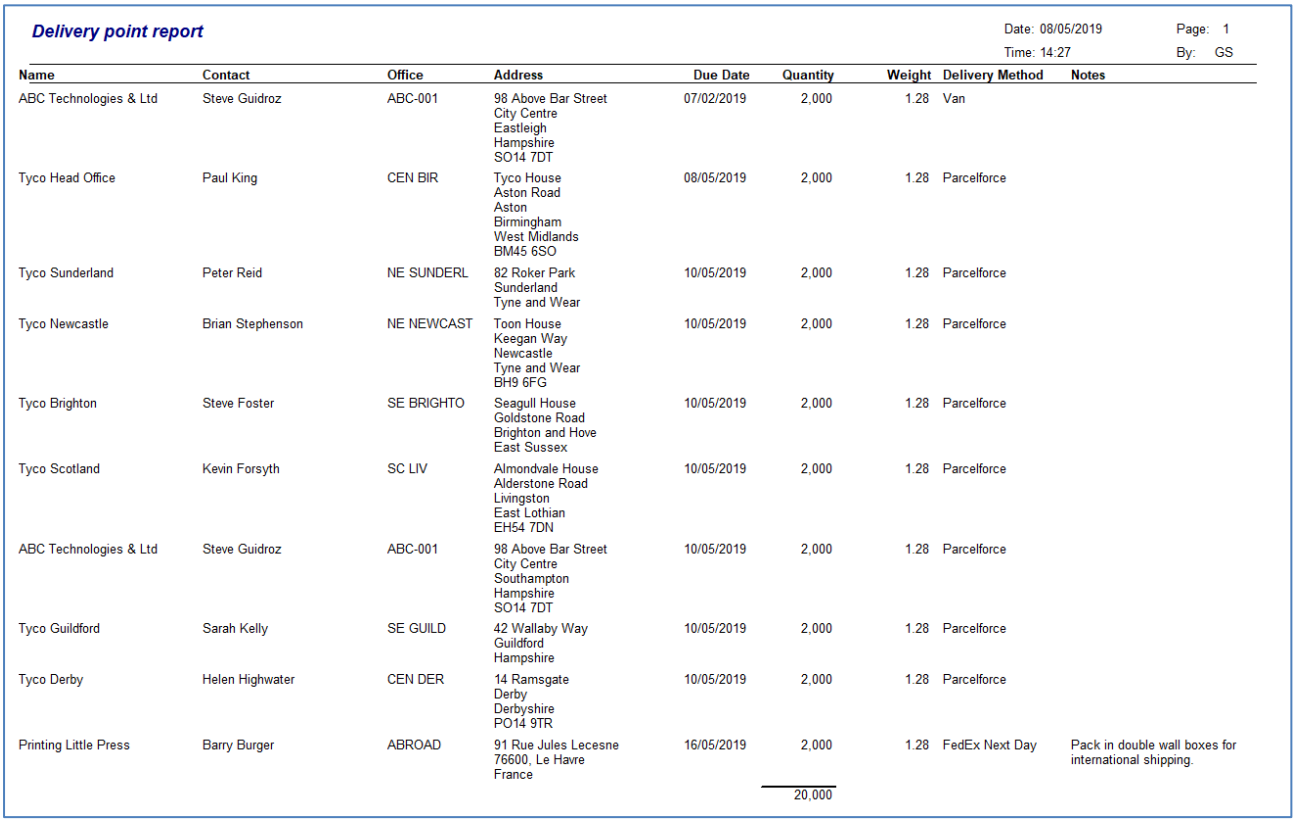


If you have the Accura Online module in place, your customers can now track the progress of their deliveries via the web portal from the Deliveries tab within the order.

This functionality has already been added to the current Accura Online 5.34 website release so will be available to you and your customers as soon as you upgrade to this latest 5.41 Build 1 version of Accura.



Delivery Point Report



Delivery point report

Date: 08/05/2019 Page: 1
Time: 14:27 By: GS

Name	Contact	Office	Address	Due Date	Quantity	Weight	Delivery Method	Notes
ABC Technologies & Ltd	Steve Guidroz	ABC-001	98 Above Bar Street City Centre Eastleigh Hampshire SO14 7DT	07/02/2019	2,000	1.28	Van	
Tyco Head Office	Paul King	CEN BIR	Tyco House Aston Road Aston Birmingham West Midlands BM45 6SO	08/05/2019	2,000	1.28	Parcelforce	
Tyco Sunderland	Peter Reid	NE SUNDERL	82 Roker Park Sunderland Tyne and Wear	10/05/2019	2,000	1.28	Parcelforce	
Tyco Newcastle	Brian Stephenson	NE NEWCAST	Toon House Keegan Way Newcastle Tyne and Wear BH9 6FG	10/05/2019	2,000	1.28	Parcelforce	
Tyco Brighton	Steve Foster	SE BRIGHTO	Seagull House Goldstone Road Brighton and Hove East Sussex	10/05/2019	2,000	1.28	Parcelforce	
Tyco Scotland	Kevin Forsyth	SC LIV	Almondvale House Alderstone Road Livingston East Lothian EH54 7DN	10/05/2019	2,000	1.28	Parcelforce	
ABC Technologies & Ltd	Steve Guidroz	ABC-001	98 Above Bar Street City Centre Southampton Hampshire SO14 7DT	10/05/2019	2,000	1.28	Parcelforce	
Tyco Guildford	Sarah Kelly	SE GUILD	42 Wallaby Way Guildford Hampshire	10/05/2019	2,000	1.28	Parcelforce	
Tyco Derby	Helen Highwater	CEN DER	14 Ramsgate Derby Derbyshire PO14 9TR	10/05/2019	2,000	1.28	Parcelforce	
Printing Little Press	Barry Burger	ABROAD	91 Rue Jules Lecesne 76600, Le Havre France	16/05/2019	2,000	1.28	FedEx Next Day	Pack in double wall boxes for international shipping.
					20,000			

It is now possible to print a report to show an order's delivery points. Previously this was only possible through the generic Send-to function meaning all visible columns were sent to print. The new report type is a wizard-type set up so users can define their own report in a similar manner to report wizards elsewhere in Accura.

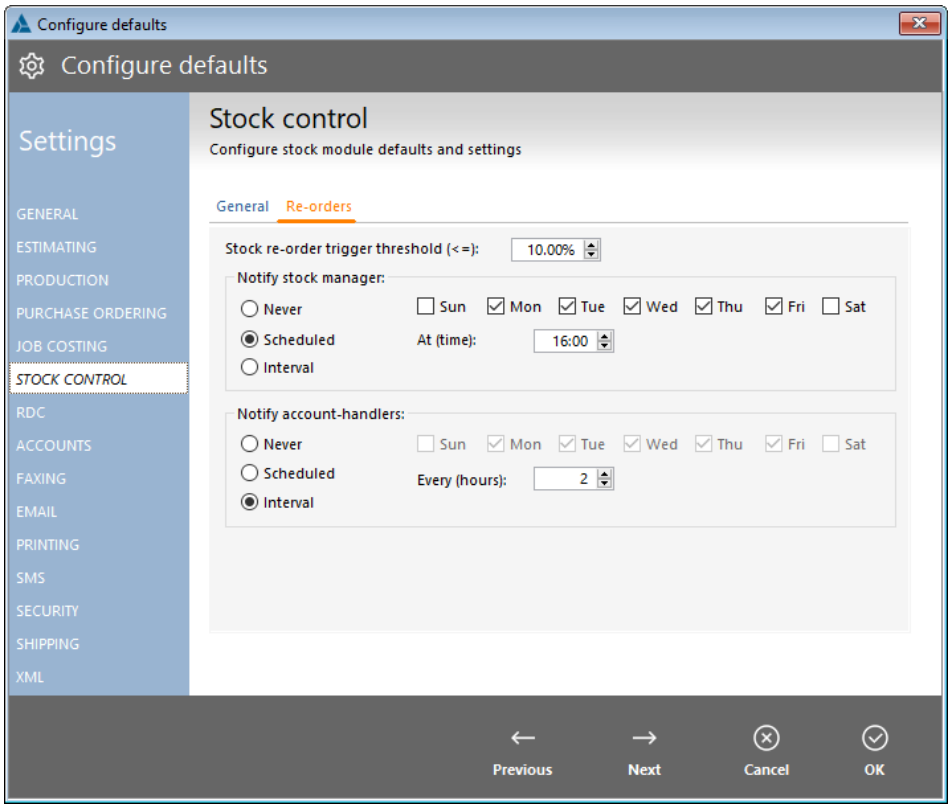
The new report can be printed from within an Order on the Delivery > Multi-drop sub-tab using the Print button. From here the user can select any existing reports or create and customise their own. These are retained for future use for all users.

For further help in using the report wizard, please contact your local Accura Support team.

Stock Replenishment Notifications

A new addition for the optional **Stock Control** module is the ability to schedule notifications when raw materials and products are nearing their re-order levels.

The notifications can be enabled and configured from **Setup > Defaults >Stock Control > Re-orders.**



Notifications are sent as emails and sent separately for raw material and products as the recipient differs for each.

For raw materials, the notification email is sent to the internal user who is named as the **Department Manager** in the **Paper** department. This can be viewed and set by going to **Setup > Departments** and editing the Paper department.

For products, the notification emails will be sent to the designated **account handlers** for the product's client owners i.e. the sales rep and/or account manager. If a stock-controlled product has no client owners but is within the re-order threshold, a notification will be sent to the paper department manager.

Notification triggers are set-up separately but both have the same options.

- **Scheduled** - notifications can be set to trigger once a day at a specific time on the selected days
- **Interval** - notification will be set at regular intervals which are set by hours between email. These are only sent on the selected days
- **Never** – No notifications will be sent.

When a raw material or product's **On-hand** figure is within the **re-order trigger threshold** percentage of its **Reorder** level, it will be included in the relevant stock notification. However, this can be overridden for individual raw materials or products by adjusting the stock re-order threshold in their own maintenance window. Please note that the alertmon service must be allowed to operate as a background service in order to use this functionality.

Transaction Report

A **transaction report wizard** has been added to the Order > Reports wizard. This wizard allows the user to create custom reports based on the order, header and items tables. As an example, the report below uses all three tables to list orders and any deliveries or sales invoices that have raised against said orders.

DN and SI report

DN and SI

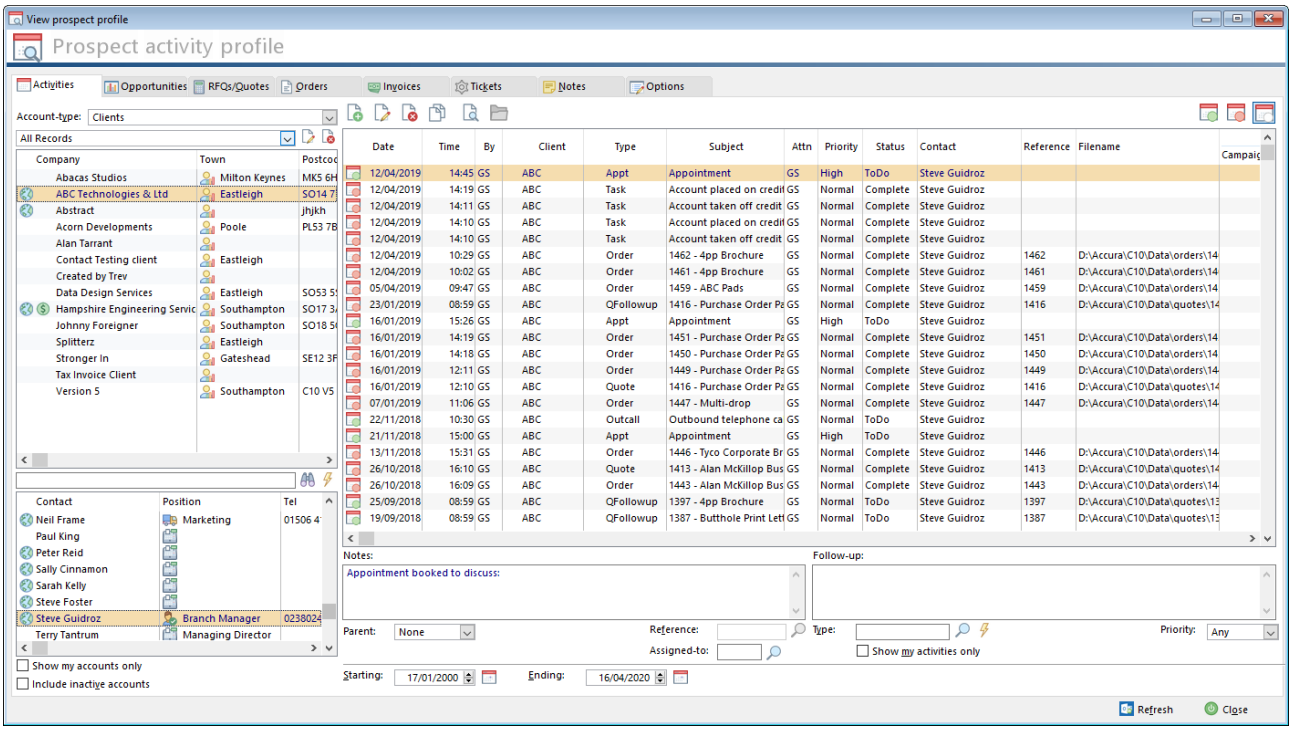
Date: 08/05/2019 Page: 1
Time: 15:37 By: GS

Client / Header Type / Line item	Header Number	Header Date	Order Number	Item Qty
1000				
Hampshire Engineering Services			**1000**	
DN	1000	25/05/2016		
Black on letterheads				500.00
Hampshire Engineering Services			**1000**	
SI	1000	25/05/2016		
Black on letterheads, A4, 1pp, Printed in black to one side only, House bond, 80gsm, Trim to size and pack				500.00
1001				
Hampshire Engineering Services			**1001**	
DN	1001	25/05/2016		
4pp Brochure				750.00
Hampshire Engineering Services			**1001**	
DN	1002	25/05/2016		
4pp Brochure				250.00
Hampshire Engineering Services			**1001**	
SI	1003	13/07/2016		
4pp Brochure				1,000.00
1002				
Hampshire Engineering Services			**1002**	
SI	1005	13/07/2016		
6pp DL, 210mm x 99mm, Printed in 4 colour process throughout, Aqueous Sealant, House silk 130gsm, Trim to size, fold and pack				2,000.00
Hampshire Engineering Services			**1002**	
SI	1005	13/07/2016		
Artwork				1.00
1004				
ABC Technologies Ltd			**1004**	
DN	1003	26/05/2016		
Compliment Slips				500.00
ABC Technologies Ltd			**1004**	
DN	1003	26/05/2016		
Business Cards				250.00
ABC Technologies Ltd			**1004**	
DN	1003	26/05/2016		
Letterheads - Market Harborough				500.00
ABC Technologies Ltd			**1004**	
DN	1003	26/05/2016		
Sales Order Sheet				500.00
ABC Technologies Ltd			**1004**	
DN	1003	26/05/2016		
Purchase Order Sheet				500.00
ABC Technologies Ltd			**1004**	
DN	1003	26/05/2016		
Letterheads - Aberdeen				500.00

This feature can be a very powerful reporting tool and works in the same way other report wizards do throughout Accura. For further information on creating custom transaction reports, please contact your local Accura Support team.

NOTE – The order, header and items tables can be very large. Complex queries on larger systems and systems with slow networks make take some time to resolve.

CRM – Activity Profile

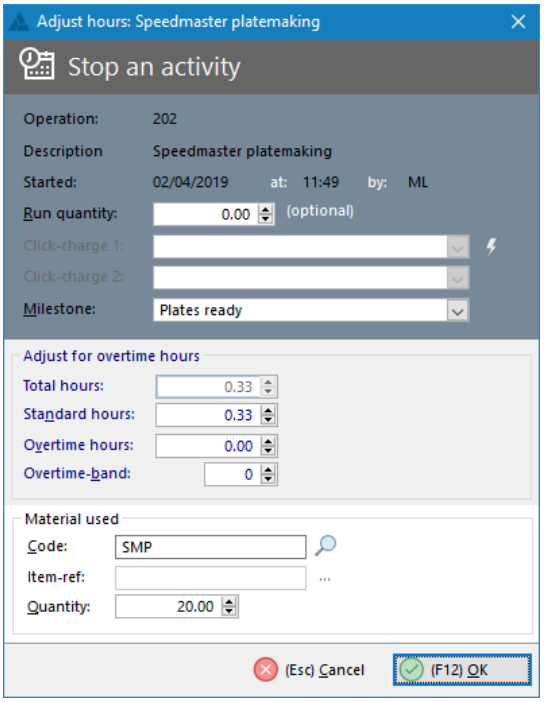


The **Prospect Activity Profile** browse has been redesigned to optimise performance on large databases. The contact-tree format has been replaced with a split-browse format similar to those throughout Accura and CRM. The change in design has also enabled us to be able to add a client locator function as well as improved context menu options.

New Features in Accura 5.40 Build 2

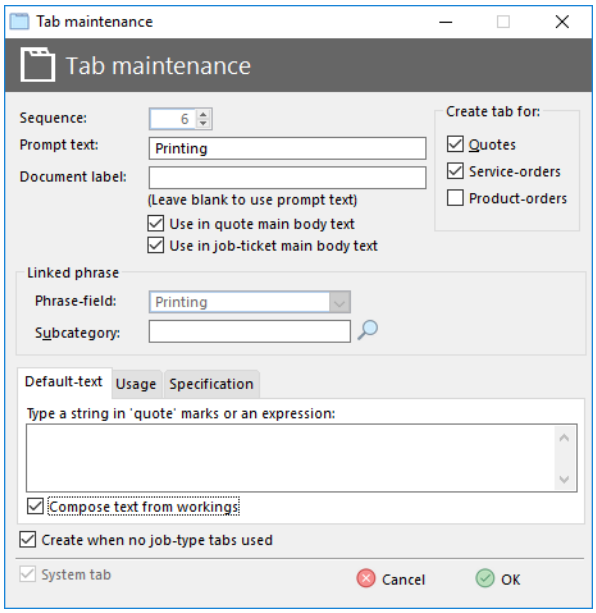
RDC Material Logging

RDC operators can now log material used during a labour activity in the Stop an Activity dialog.



This is a great time saving addition as the user will no longer have to separately issue material to the job before/after starting a process within the RFQ module.

Tab Configuration

In addition to previous flexibility with tab maintenance, you will now have the option to "compose text from workings" for each of the tabs that you have chosen to be visible from the Setup > Tabs menu.

Previously you could only choose to compose the text from workings for ALL tabs from the quote itself.