



# Version 6.12 Release Notes

*Accura 6.12 Build 7 compiled on 1<sup>st</sup> February 2022*

*Accura Online 6.20 Hotfix 1 compiled on 4<sup>th</sup> November 2021*



# Introduction

## Welcome to Accura Version 6.12

Version 6.12 is the latest release for the Accura MIS, and contains many new features, fixes and changes as well as support for AccuraOnline 6.20.

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. Please contact the UK [Accura Support](#) team for information on how to download and install this new version. 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** in Accura and AccuraOnline since the last major public releases, which were Accura 6.11 Build 3 and AccuraOnline 6.11.

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 6.12 Build 7 (1<sup>st</sup> February 2022)

### Email, Fax and SMS

**FIX:** No error would display if email sending failed. The email dialog would remain on screen giving the impression Accura had hung.

### Order Processing

**FIX:** Works-order images could be incorrect when raising multiple work-orders from one product order.

### Purchase Ordering

**FIX:** Copying an invoiced purchase order could prevent receiving and invoicing the new purchase order.

### Stock Control

**FEATURE:** Product orders will now have the package type assigned from the product's default package type. For orders where there is more than one product and the ordered products have different default package types, a value from one of the products will be assigned. The onus is thus on the user to change the order package type where necessary.

**CHANGE:** Products that have zero cost, zero sell and are set not to be invoiced on issue, will no longer have their cost price updated when transferring a works-order into stock.

**FIX:** Product package types were not being displayed in *Stock maintenance > Pricing > Packing*. To resolve this, the control has been changed from a drop combo to an entry field with look-up.

**FIX:** Child items for a BOM product were not recalculating sell prices correctly in some circumstances.

### CRM

**FIX:** Browsing for an opportunity from an activity opened in a client record would cause a run time error.

### AccuraShip

**FIX:** Accura generated JSON has been updated to replace fields deprecated by EasyPost with the new attributes.

**FIX:** Service names over a certain length were being truncated when booking a consignment causing a booking failure.

**FIX:** The carrier and service were not displaying in the delivery note after booking a consignment.

### AccuraSync

**FEATURE:** The Accounts Synchroniser app now features a "Service Status" button which takes the user to their accounting platform's service status webpage. This should be used in any troubleshooting when trying to diagnose why the accounts link is not communicating.



**CHANGE:** The AccuraSync file that contains the daily API limit now shows the data and time of when the API limit was reached.

**CHANGE:** There have been significant performance improvements when initially populating status files.

**CHANGE:** A Save button has been added to the Mapper tool to improve the performance when generating / updating status indicator. When a change has been made within a Mapper category, the save button should be used to save changes before progressing.

**CHANGE:** There have been significant performance improvements in the general usage of the Mapper tool.

**FIX:** Clients that are downloaded from the accounts package but were marked as Prospects in Accura would get mapped when using Auto-link in Mapper.

**FIX:** AccuraSync would continually send requests to the accounting platform when the daily API limit had been reached. This could result in many failure emails per minute until the API limit reset.

**FIX:** The CTRL-A keyboard shortcut was not tagging records correctly in the External pane of Mapper. In addition, a "Select All" tick box has been added to the UI.

## Accura Online

**FIX:** Product HTML would not be uploaded to AccuraOnline if the HTML contained < 80 characters. This limit has now been reduced to 10 characters.



# Changes in Accura 6.12 Build 6 (16<sup>th</sup> December 2021)

## General

**FEATURE:** NoteID has been made available to the query wizard in many major browsers. Using the expression "NoteID <> 0" will return records that do have a note.

**CHANGE:** Client pop-up notes will now display when a quote or order is copied.

## Email, Fax and SMS

**FIX:** Emails with multiple comma or semi-colon separated addresses in the To field would cause the email to fail. It should be noted however, it is bad practise to use multiple email addresses in a contact's email field as this can break AccuraOnline functionality.

**FIX:** Emails with multiple comma or semi-colon separated addresses in the CC or BCC fields would not get sent to these recipients.

## Client and Supplier

**FEATURE:** The list of characters prohibited in client and supplier codes has been revised and added to. This change will help prevent bad data causing issues in modules such as AccuraOnline, AccuraSync and CSV exports.

## Estimating

**FIX:** Deleting a quote's order was not clearing the QTE:OrderID field.

**FIX:** The quote mark-up value would get removed if the Unit Price Per was changed.

## Order Processing

**FEATURE:** Orders that are not movable will have a padlock icon displayed next to their Required date in View Orders.

**FIX:** Populating an order's title and specification solely from the Phrase Library would not generate the order's Invoice Text

## Purchase Ordering

**FEATURE:** Purchase order items now feature a Notes tab that will display the notes (if any) of the material or product being ordered. If a note is present, the Notes tab will display an icon. It is also possible to view the note by hovering the cursor over the Code and Description columns of the PO items. If a purchase order is copied, any amendments to the notes will not be retained and the notes from the table item will be pulled through.

The text field NTE:Notes has been made available to the purchase order layout's details band to print these notes if required.



## EasyPost

**FEATURE:** When an EasyPost shipment is being charged to the recipient, the Invoicing and Costing - "Charge delivery as" setting on the delivery note Shipment > Carrier tab will automatically get set to None, overriding any default. This is to prevent costing and invoice information being recorded for a delivery that has no cost or sell price to the Accura user and thus no costing entry will be created. This can be manually changed on an individual delivery note basis if required.

## AccuraSync

**FEATURE:** An email notification will now be sent if the daily API limit is reached.

## Accura Online

**FIX:** Accura Online links included in emails sent from Accura were not being prefixed by the correct communications protocol if an SSL certificate was in place.





## Changes in Accura 6.12 Build 5 (25<sup>th</sup> November 2021)

### Estimating

**FEATURE:** Markup and Markup Method columns have been added to the quotes pane of the Quote Template Library.

**CHANGE:** A warning when a custom quantity has been selected will now display when a quote section is edited. This reinstates behaviour intentionally removed in a previous version of Accura.

**FIX:** Where estimating default outwork markup method = dept and using the estimating component markup feature in a quote, any markup % set in the outwork table default area would not be visible in the analysis, giving discrepancies between workings and the analysis. Markup % is now visible when using the dept working default.

### Order Processing

**CHANGE:** A client Code column has been added to the View Order Sales Analysis window.

**FIX:** It was possible to create order points for products orders when changing a service order to a product order. Now any excess order points will be deleted when the order type is changed.

### Stock Control

**FIX:** A translation made on the word 'Material' could cause a material to not be visible if it was toggled to be a product then back to a material.

**FIX:** Closing off a works order that had previously been invoiced would change the order status back to Completed.

**FIX:** The stock allocation for an order's material would double in quantity if the associated quote was opened, re-saved and the order updated.

**FIX:** Opening an order section that used a stock material would double the allocation when the order was saved.

### Job Costing

**CHANGE:** Order specifications have been reinstated to material and outwork batches. The Notes field has now been moved to its own tab.

**CHANGE:** Zero cost items did not show in View Cost Summary. This was by design but has been reinstated at customer request.

### Sales Invoicing

**CHANGE:** Transaction navigation has been reinstated to the Sale Invoice window.

### RDC

**CHANGE:** Job sheets and work sheets emailed from RDC will now use the currently highlighted user's email address, if they have a value set-up in their user profile.

**FIX:** Opening an order from the RDC View / Update activity window would cause a run time error.



## Scheduling

**FEATURE:** The Send-to function has been added to the right-click menu of Scheduling Planner's Pending Orders pane.

## AccuraSync

**CHANGE:** Validation will be performed after access tokens have expired to ensure that the correct accounts platform dataset is being reconnected to.

**CHANGE:** The nominal class field is now available to edit in View Nominals when AccuraSync is enabled.

## Accura Online

**FIX:** eDoc attachments for works orders generated by web store orders on systems where "Skip product order for single basket work order items" is turned off were not being renamed with the order number prefix correctly.

**FIX:** Order delivery method would be blank if a web order had a delivery option. Now the delivery option's Description will be used.



# Changes in Accura 6.12 Build 4 (2<sup>nd</sup> November 2021)

## Clients and Suppliers

**CHANGE:** The Email field in a web-enabled contact is now validated to detect the presence of multiple, comma or semi-colon separated email addresses as web contacts with email values containing multiple email addresses cause issues with Accura Online.

## Tables

**CHANGE:** New paper materials will now have a minimum weight of 0.1gsm enforced to prevent estimate calculation issues.

**CHANGE:** Section paper materials will now be assigned a minimum weight value of 0.01 to prevent estimate calculation issues.

## Estimating

**FIX:** Using the old FE html editor would cause the tendering process to fail by not assigning the QTW:TenderId value

## Delivery Notes

**FIX:** Selecting an order into a Delivery Note item would not update the delivery town value when the address was different to the original delivery address.

**FIX:** Using the Product Notes option in the right-click menu within a delivery note would generate an Open View Error message.

## Invoicing

**FIX:** Custom delivery address contact now maintained on the delivery tab of the sales invoice.

## Purchase Ordering

**FIX:** Purchase Order item description was inheriting previous selection on multi order item PO.

**FIX:** The PO delivery contact field would be blank when the PO was raised by PO wizard or PO requisition.

**FIX:** You could not create a purchase invoice item not linked to an order after a purchase invoice item linked to an order had been created.

**FIX:** The label next to the payment terms on a Purchase Invoice > Extra tab would not be correct depending on the method the PI was raised.

**FIX:** The "Due for payment by" field on the Purchase Invoice > Extra tab was greyed out.

## Stock Control

**FIX:** Issuing material to a job with several lines of the same material would always pull in the top line, regardless of which line was selected.

**FIX:** Stock allocations could be incorrect if the same material was used for different sections in the same order.



# Job Costing

**FIX:** Rogue costing entries could be created in an order if an entry had been created by a PI extra and there were items on that PI not linked to an order or PO.



## Changes in Accura 6.12 Build 3 (18<sup>th</sup> October 2021)

### Email, SMS and Text

**FIX:** The email broadcast email editor was not loading.

### Estimating

**FEATURE:** Mark-up notes are now shown in View Mark-ups

**FEATURE:** The Select Mark-up Members browse has improved filtering options.

**CHANGE:** Making changes to fields on a quote's Profit tab would force the user to toggle between the Workings and Analysis tabs in order to reanalyse the quote. Now changes made to the Profit tab fields will trigger an auto-recalculation.

**FIX:** Selecting a mark-up profile in a quote could display its notes several times. Now they will display only once, on selection.

**FIX:** A resize issue with controls on the Workings tab of a quote has been resolved.

### Order Processing

**FIX:** Queries referencing the layers table (order sections) did not work in the Order Status browse.

### Accura Online

**FIX:** Manual web quotes, i.e. non template or repeat, would lose their contact if there was an office selected to which the original contact did not belong to in Accura.

### AccuraSync

**FIX:** 'Adding' a new record in Mapper could unlink a previously mapped record.

**FIX:** Issues relating to unmapped clients generating sync data have been resolved.

### XML Toolkit

**FIX:** XML input files with an incorrect <originator\_id> tag would not get processed or failed causing rogue web tasks to be created and a backlog in web monitor processing. This fix was initially in build 1 then removed from build 2.

**FIX:** The XML Toolkit will no longer generate unnecessary web task when processing xml transactions.



## ***Changes in Accura 6.12 Build 2 (12<sup>th</sup> October 2021)***

### **Email, Fax and SMS**

**FIX:** The email send dialog was always showing, ignoring any options where it was set to false.

### **Estimating**

**FIX:** The Notes button at the bottom of Quote details was not functioning.

### **Stock Control**

**FIX:** Raising a works order for product was removing the linked the quote from the product.

### **Purchase Ordering**

**FIX:** The Delivery Town value in Purchase Orders that inherit the delivery address from the job was using the system town value.

### **AccuraSync**

**FIX:** It was not possible to alter the exchange rate in currencies that had been mapped to the accounts package.

### **XML Toolkit**

**CHANGE:** Client and contact records updated by XML import will now have their UpdatedBy values set to 'XML'. Previously, this value would just be left blank.

**FIX REVERSAL:** The build 1 fix to address an incorrect originator\_id tag has been reversed



# Changes in Accura 6.12 Build 1 (7<sup>th</sup> October 2021)

## General

**CHANGE:** Support for Marlin and Quote & Print has been removed from Accura.

## Tables

**CHANGE:** Press processes fields now support up to 25 characters to bring them in line with labour codes.

**CHANGE:** The Select Table Items browse now supports list formats.

**FIX:** Browsing for a Group from within a non-paper material was not filtering by the material's parent department.

**FIX:** Group values added to List Options from within a material's Group browse was not applying the correct parent value.

## Email, SMS and Fax

**FIX:** Certain special characters such as " and & would cause proof response text to be truncated.

**FIX:** The [AssignedUser] merge token was using an incorrect expression. This value will be changed to "Email:CurrentName" during the upgrade.

## Client and Supplier

**CLARIFICATION:** Office imports use the OFF:Postcode value as a reference. In the unlikely event that two or more offices in an import file have the same post or zip code, only one of these records will be imported. For this reason it is recommended that an office code value is specified in office import files if two or more of the records use the same post or zip code values.

**CHANGE:** Primary Contact Email CON:Email and CLI:Email can now be updated independent of one another. Previously synonymous with each other, the link association can now be removed by updating the Primary Contact email.

**FIX:** Contacts created for during an office import were not being linked to their office record.

## Estimating

**FIX:** Manually updated unit prices were not updated correctly when a quote was reanalysed and the quote contained only outwork workings on systems where the default outwork markup basis was Working.

**FIX:** An Access Denied error would be posted when a user with the EST:Target security door denied would calculate a quote.

## Order Processing

**FEATURE:** Accura will now offer to update the delivery contact in an order when the main contact is changed.



**FIX:** The Order Requisition would not close at the first attempt when called from within an order.  
**FIX:** Trying to raise a works order from an order's output options by ticking "Raise purchase/works orders" would not open the order requisition window in systems that do not have the purchase ordering module.  
**FIX:** Multiple works-orders raised from the Order Requisition window would not populate the client name and address correctly for each order after the first.  
**FIX:** Radio button filters within the client browse from the delivery tab of an order would not maintain user selection.  
**FIX:** Copying an order with multi-drop order points would not allow the copy to save without selecting an order ship by date.

## Purchase Ordering

**FEATURE:** HDR:Processedxxx fields have been made available to Purchase Order layouts.

**CHANGE:** A warning will now be generated during the creation of a purchase order if one of the purchase order item materials has been marked as "Inactive".

**CHANGE:** It is now possible to enter an alphanumeric value in the Supplier confirmation Supplier-ref field.

**CHANGE:** Purchase order attachments that are pulled through as artwork from the parent order now display in the Attachments tab of the Purchase Order. This will allow the user raising the PO to untick the Output flag for any order artwork attachments that are not relevant to this PO.

**CHANGE:** Tagging a material in Select Table Items when called from a PO item will now take precedence over the highlighted record.

**FIX:** "Deliver to" radio buttons within purchase order not correctly updated with address information where Supplier using option for "Assign job delivery address to purchase-order"

**FIX:** Purchase Order Receipts window was erroneously displaying a supplier name when called from View Purchase Orders.

**FIX:** It was not possible to drag and drop phrases from the phrase library to Purchase Order item description fields.

**FIX:** A purchase invoice item would not save without a purchase order number.

**FIX:** Nominal validation was not being correctly executed when raising a purchase order from within an order.

## Stock Control

**FEATURE:** STA:Time now an available field through the Stock activity wizard report.

**FEATURE:** New fields have been added to the stock activity table and so are available in the Stock activity wizard report. These fields are listed below with an explanation of how they are used:

- **STA:AllocatedBF** - MTL:Allocated before the transaction is posted
- **STA:Allocated** - MTL:Allocated at time of transaction AFTER posting (carried forward)
- **STA:AvailableBF** - MTL:Available before the transaction is posted
- **STA:Available** - MTL:Available at time of transaction AFTER posting (carried forward)
- **STA:OnHandBF** (existing field but repurposed) - MTL:Onhand before the transaction is posted.
- **STA:Onhand** - MTL:Onhand at time of transaction AFTER posting (carried forward)

A material **balance** will be required to populate these new fields for each required material. Please contact Accura Support for more information on balancing stock materials.

**CHANGE:** Resync of quote template to product prompt will now give the choice of syncing either/or from cost price, sell price or both.

**CHANGE:** Custom costing report field LBR: Code character allocation amended to 25 Characters which mirrors the change made to UpdateLabour LBR: Code, made in previous versions of Accura.





**FIX:** Issuing a stock-controlled material from the RDC Stop Activity dialog would perform a full stock balance for that material which could take some time on materials with a lot of stock activity data. **NOTE:** Stock close-offs and stock transaction purging should be carried out regularly in order for the stock control module to run at an optimal speed. **FIX:** Systems without the optional job costing module would display a non-approved order warning when issuing materials. **FIX:** It was possible to issue more material than was on-hand when issuing materials by batches.

## Delivery Notes

**CHANGE:** Client or office shipping preferences will always take precedence over a carrier/service selected in step 2 of the Delivery Wizard unless "Override client-specific carrier defaults" is ticked.

**FIX:** Client or office shipping preferences were being ignored when processing through the delivery wizard.

**FIX:** The Tracking button in the Shipping > Tracking tab of a delivery note was available when no tracking information was present.

**FIX:** Delivery note emails were not being addressed to the order delivery contact's email address if they were a custom contact.

**FIX:** Delivery method not being correctly updated with the primary order point record value from orderpoint.tps which would lead to a legacy delivery method being shown.

## Job Costing

**CHANGE:** An un-estimated cost added at job costing approval stage would inherit the order's nominal code. It will now inherit its table nominal value.

**CHANGE:** A warning will now be displayed when a user attempts to log time against an order that has been delivered.

**FIX:** Tax code entry box in Approval Wizard was not staying relative to other controls when window stretched vertically.

**FIX:** On systems with job costing, the non-approved order warning would appear multiple times if the invoice was nominal or tax type and "Yes" was answered at the prompt.

**FIX:** On systems with job costing, saying "No" to the non-approved order warning, a blank invoice would generate containing line items for rogue order items.

## Invoicing

**FEATURE:** The field ITM:OtherRef has been made available to invoice layouts.

**FIX:** The delivery contact and office values could be removed from an invoice if it was opened and saved.

## CRM

**FEATURE:** The CRM batch activity wizard now features "Display inactive record" and "Only show favourite" filter checkboxes.

**FIX:** Run time errors were generated by certain operations within CRM such as marking a To Do activity as complete.

**FIX:** After opening and saving an order in View Prospect Profile, highlighting and opening the PDF for a different order would display the PDF of the original order.

**FIX:** Copying then cancelling an appointment in Update Service Ticket would create the appointment regardless

**FIX:** Using the Delete on a highlighted appointment in Update Service Ticket would open the record rather than delete it.

**FIX:** The Reminder window was not being displayed on demand if there was nothing to display.



## RDC

**FIX:** The list of materials would not be fully populated when issuing a material through the RDC Stop Activity dialog if a supplier was already in the memory buffer.

## EasyPost

**FEATURE:** The Email fields for the Collection and Delivery contacts are now visible in the UI.

**FEATURE:** It is now possible to specify the Return address for a consignment in the Returns tab. These values will be stored as ini values and used in subsequent rates queries until changed or cleared. If no Return details are specified, the Collection details will be used by default.

**CHANGE:** EasyPost debug has been improved to enable the capture of all posts and responses, not just that of the last posted query. When a carrier is selected from the new Carrier Query dropdown, the post and response will be displayed for the selected carrier. This can either be added to Clipboard or saved in the Accura\Data folder using the new Save button. These save files are named similar to "EasyPost\_Posted\_UPS\_20210506\_17\_07\_53.json" and "EasyPost\_Response\_UPS\_20210506\_17\_07\_53.json" where the type of file (Posted /Response), carrier account name and the date-time are included.

**CHANGE:** Altering the Collection, Delivery or Return details will force a re-fetch of rates.

**FIX:** The Collection email field was not being sent with Rate requests.

**FIX:** The icon for Royal Mail was not displaying.

**FIX:** Some EasyPost fields were not written back to delivery notes when the service booked contain no tracking information. This would give the impression that the consignment had not been booked. The Shipping Reference field will now read "Tracking Not Available" when no tracking information has been returned by the EasyPost API.

**FIX:** The Carrier filter in the Get Carrier Rates window was not functioning.

**KNOWN ISSUE:** While testing predefined packages it became obvious that error reporting was not being received back from the EasyPost API. After raising a support case with EasyPost support, they admitted that error reporting from the orders endpoint is not reliable. This means that rates may not get returned and the user is not given any reason. It's likely always been this way and no-one has ever brought it up. EasyPost have it logged as a bug but have as yet no plan to fix it.

It is possible to get a specific error by using the Postman API application, querying the shipments endpoint so investigations will need to be carried out by Accura Support using this tool.

## XML Toolkit

**CHANGE:** A contact's phone extension is now output to contact, client and office XML.

**FIX:** XML input files with an incorrect <originator\_id> tag would not get processed or failed causing rogue web tasks to be created and a backlog in web monitor processing.

## AccuraSync

**CHANGE:** A 60 second delay has been added from the initial creation of a json file to its sync out. This has been introduced to address issues where multiple json files could be created for any single transaction due to the way Accura saves records to the database.

This setting is stored in AcctsLink.cfg as Detection\_Delay. This defaults to a value of 60 seconds and supports values of between 1 and 600. If set outside of this range, it will revert back to 60. This setting should **only** be amended by Accura support

**CHANGE:** Currencies and nominals will now also attempt to link by name as well as code when using Auto-link in the mapping utility.

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**FIX:** Failure emails on systems that use user-specific email addresses, such as O365 or Gmail, may not have been generated if the email was sent via an unauthorised user for the prevailing email settings. This could cause issues with the app to have seemingly hung and internal id values not written to the database correctly.

To address this issue, it is now possible to add custom SMTP email details to Accura Sync enable sending of failure emails under the service's (administrator) account. Please see the latest version of the Accura Sync documentation for further details.

**FIX:** Failure emails could not be sent if the Accura email method was set to MAPI which would cause the failed json to "stick" in the Processing folder causing a back-log of tasks and a seemingly hung app.

**FIX:** Invoices with over 255 of line items would never get synced out due to a looping issue.

## Accura POD

**FIX:** Alert monitor was not writing POD delivery data back to the parent header record.

## Accura Online

**FEATURE:** The Details pane in Web Console now shows the stock status icon for stock-controlled products as well as quantity, availability and re-order threshold.

**FIX:** Linking or unlinking products within a client was not updating the record in Accura Online.

**FIX:** The Standard downloader could download eDoc .zip files with a .pdf extension.

**FIX:** URLs created by merge tokens were being converted to lowercase which could break links to Accura Online resources such as delivery and invoice PDFs.

**FIX:** The customer order number (ORD:Orderno) had a forward slash added to it when webmon received the order.



# AccuraOnline 6.20 Hotfix 1 Release Notes (4<sup>th</sup> November 2021)

## Products / Store

- FIX:** Public products were not displayed in the store or Admin product lists on domains running in B2B or B2BH branding modes
- FIX:** Product filter checkboxes in domain settings and client branding could not be checked or un-checked
- FIX:** The client branding setting 'hide public products in store' was visible in B2B branding modes when it should only be visible in B2C branding mode

## Checkout / Addresses

- FIX:** Office address cards in the checkout billing and delivery steps could not be selected on mobile devices
- FIX:** Searching the office lists in checkout billing and delivery where only one office was returned would cause the office search/sort header to disappear after selecting the office

## Miscellaneous

- FIX:** Resolved a number of issues that could trigger crashes on Accura data sync when expected data was missing from the database



## Changes in Accura Online 6.20 (11<sup>th</sup> October 2021)

Please refer to the **New Features** document for full information on new functionality in this release. This section covers complex and/or minor changes only.

### Address Areas (Checkout & My Account)

**CHANGE:** Minor wording changes have been applied throughout the addressing areas

**CHANGE:** The heights of address cards have been reduced as much as possible based on the address format (UK or overseas) and also if phone and email details are being displayed. This minimises wasted screen space, especially for non-UK users

**CHANGE:** Global search via the website header or menu area can still be used to perform address searches in the 'checkout billing/delivery' and 'my account addresses' areas as in previous versions. The Address search text entered via the global search feature will automatically populate the address list search text field in 'checkout billing', 'checkout delivery' and 'my account', and vice versa

**CHANGE:** In the 'checkout billing' and 'checkout delivery' steps, the currently selected address is always excluded from the list of addresses below the search and sort header (if these are being displayed in the first place). This design felt more intuitive than having the address display in two places. My account does not behave in the same way as there are multiple actions available on addresses such as "set delivery", 'edit' and so on

**CHANGE:** Checkout delivery step: contact phone and email values are now displayed for client accounts in the current address details card. Previously this only worked on B2C accounts

**CHANGE:** Checkout delivery step: phone and fax are now both required fields in custom addresses

**CHANGE:** Checkout billing step for a B2C account that had previously submitted a store order request no longer requires you to select the previous address card to go to next step

**CHANGE:** Extensive code refactoring and rewrites have been made to the addressing areas of the website which may bring about undocumented changes

**FIX:** Resolved broken layout issues in the custom address forms when empty fields triggered validation messages

**FIX:** Entering custom delivery details without entering a company name, or selecting an office without a company name did not use bold text for the first address line displayed in the current address card

### Website Searches

**FEATURE:** All admin searches now display a reset icon on the right of the search entry text box to reset search text

**FEATURE:** Added text search to Admin news which returns matches on date and title

**FEATURE:** Added text search to Admin job types which returns matches on ID, code and description

**FEATURE:** Added text search to Admin pages which returns matches on name, title and last update

**FEATURE:** Added text search to Admin security profiles which returns matches on ID, name and description

**FEATURE:** The Admin accounts list now supports searches on client code, client name, and security profile name

**FEATURE:** The Admin client branding list now supports searches on ID

**FEATURE:** The Admin delivery options list now supports searches on charged by

**FEATURE:** The Admin domains list now supports searches on ID and name

**FEATURE:** The Admin email notifications list now supports searches on comments values

**FEATURE:** The Admin product list now supports searches on the eDoc template name

**CHANGE:** All searches throughout the website have been standardised to trigger automatically 0.5 seconds after the user stops typing

**FIX:** Text searches in 'checkout billing', 'checkout delivery', 'my account', Admin 'products', and Admin 'accounts', have been fixed to avoid problems with special characters or spaces causing invalid searches, incorrect address formatting on specific search terms, and browser refreshes triggered by pressing return in the search field. This will be expanded to other search areas (mainly the admin searches) in a later release

**FIX:** Admin accounts list searches did not highlight the search text in search results

**FIX:** Admin spec options searches did not retain the currently selected type filter value



# Mobile Responsive Support

**FEATURE:** Improved performance on high resolution displays using screen scaling (e.g., mobile phones and high-end laptops) by generating 'retina' images for all website images. Retina images will be created during upgrades and will be maintained automatically from then on

**FIX:** It was not possible to enter new addresses on small mobile screens that were not tall enough to display the full contents of the address form. The layout of the form has been widened for mobile users, and allows vertical scrolling when it still doesn't fit on the mobile screen

**FIX:** The checkout wizard B2C user sign-up form displayed the fields in the wrong order on mobile screens

**FIX:** Resolved issues with the 'back' and 'next' buttons on mobile screens overlapping each other during checkout wizard sign-up and existing account logon

**FIX:** Improved the layout of the B2B signup form for mobile devices

## Retina Image Creation

Retina images are created using the 'Create retina images' action displayed in Admin settings after an upgrade. This generates images for products, quote/order templates, user account photos, logos/banners, slide, tiles, and (if you have the eDocBuilder module) product order artwork thumbnails. In order to prevent excessive amounts of image processing and use of web server disk space, these images are limited in various ways:

- Retina images are only generated for data that is likely to be accessed frequently by end users. Images relating to legacy data that is not likely to be viewed are not processed
- There is a default limit of 500 images that will be processed at a time. If there are more than 500 images, the 'Create retina images' script will need to be run multiple times until it processes all applicable images. This will be reported to the Admin user when running the action
- The limit on images processed can be overridden by entering a direct URL specifying a new limit, for example to process 1000 images instead of 500 you would enter `/create_retina_images?limit=1000`
- It is possible to process retina images for all legacy data regardless of its age by running the website in debug\_ui mode via config.yml. This will cause an additional action to appear 'Create legacy retina images' that will perform an exhaustive image conversion on all images stored in the database
- An alternative to using debug\_ui mode to create legacy images is to enter a direct URL specifying legacy mode, for example `/create_retina_images?limit=500&legacy=true`

## User Images Folder Support

**FEATURE:** Added a standard folder '/public/user\_images' that we can use to upload customer-provided content when requested. We need to use a standardised folder that is excluded from the source code management. If images are found in this folder, the website offers to create retina images for them on the Admin settings page

Note: user-uploaded images will need to be moved to this folder during upgrades to 6.20 and all links to these images (for example in custom page records) will need to be updated to point them to this new location. ***This should be flagged up by Accura support prior to installing upgrades***

## Online Help

**CHANGE:** Most of the new online help content is only visible when logged into the Admin account. Only the currently installed AccuraOnline version remains visible when not logged in, or when logged into a client or B2C account. This version information can also be accessed via the manual URL: `/version`

**CHANGE:** Version history for AccuraOnline releases between 5.00 to 5.35 has been removed from the Online help area. This information is available upon request from Accura support and is contained within the historic Accura new features and release notes guides

**FIX:** Outdated default logos appeared on the Admin area toolbar when a website was not using a custom logo image



# User & Admin Products

**FEATURE:** The product 'lead time' from Accura now displays on the product details page for both Admin and end users. Previously lead times were only visible when items were out of stock. This requires the 'View stock levels' permission

**FEATURE:** The product owner (client or public) displays on the Admin product details page when running the website in B2C mode

**FEATURE:** The product ID as used in Accura now displays on the Admin product details page

**FEATURE:** The last selected tab (products or basket items) is stored for the Admin user account

**CHANGE:** The Admin view products thumbs view has been removed as it wasn't useful to display items in baskets and stock levels

**CHANGE:** It is now easier to click in what appears to be empty space around product details in the end user product lists to go to the product details page

**CHANGE:** The upgrade script that runs during upgrades will delete legacy basket items for deleted products and deleted accounts to prevent them from appearing in the new basket item lists

**CHANGE:** Extensive code refactoring and rewrites have been made to the products areas of the website which may bring about undocumented changes

**FIX:** The Store menu did not automatically disappear when the logged in account did not have the view products permission. The quotes, orders and proofs menus however did behave like this in previous versions

## Custom Product Filter URLs

The new **Product Owner** filter can be used in manually entered URLs when creating custom links in the Admin area. The 'owner' parameter should be added to the custom URL with one of these three values: 'client', 'public' or 'both'

When building product filter URLs, the first parameter must always be `?filter=true`, and you can specify the remaining parameters (which correspond to the filters you are applying) in any order prefixed with an ampersand (&). Each filter name is followed to an equal sign (=) and then the value for that filter

There must be no spaces in the entire URL. If any of the filter values have spaces in them, you must replace the spaces with '%20'. Values must be entered in proper case. You cannot use non-alphanumeric characters in values otherwise you will create an invalid URL unless you are technical enough to work out (via the internet) what the correct URL encoding is for whatever non-standard characters you are using, which is beyond the scope of this document

For example, to display only client owned products and not filtering by any other settings you could use this URL:  
`/products?filter=true&owner=client&category=&group=&colour=&finish=&depth_and_width=`

Or, to display publicly owned products filtered by the group value 'Stationary' and size value 'A4 Portrait' (note the space in the size value) you would use the following URL:

`/products?filter=true&owner=public&category=&group=Stationary&colour=&finish=&depth_and_width=A4%20Portrait`





# Emails, Automated Reminders & Clean-ups

**FEATURE:** When running the 'Outstanding basket items reminder', any accounts that do not have permission to use the checkout will NOT be emailed because it would be impossible for them to access their basket items. The same applies to the automated daily basket reminders. If there are any issues with permissions, running the 'Basket reminders' action from the Admin area will report back to the Admin user how many accounts have been skipped due to missing permissions

**FEATURE:** Similar permission validation is performed when running the 'Outstanding requests reminder' email, except in this scenario each outstanding request is tested against the account permissions and then removed from the email content if the account does not have the required permission to submit or cancel the request. The email will not be sent if the account lacks permission to respond to any of their outstanding requests. This also applies to the daily reminder emails and is reported back to the Admin user when running the 'Request reminders' action

**CHANGE:** The permission handling and reporting of the old 'Outstanding request approvals reminder' has been updated to reflect the behaviour of the two new reminder emails as described above

**CHANGE:** All emails including request tables now contain user-friendly values for the request 'status' and 'type' values, which can be cryptic and mean very little to end users. This also includes the table displayed when using the 'check payments' action in Admin settings

**CHANGE:** The 'guest order request confirmation' email has been renamed to 'B2C order request confirmation' to clarify terminology (the word 'guest' was considered confusing)

**CHANGE:** The 'outstanding basket item reminder' will automatically delete basket items for deleted products each time it runs to avoid sending emails about products that would be impossible to order

**CHANGE:** The upgrade script that runs during upgrades will delete invalid store orders with no items on them as a result of their basket items belonging to deleted products. This ensures that request reminders cannot be sent for empty store orders

**CHANGE:** The upgrade script that runs during website upgrades will remove any invalid permissions that happen to exist on legacy security profiles to avoid issues with automatic basket item and request notifications for accounts that do not have the necessary permissions to respond to the reminders

**CHANGE:** All automated email reminders are now triggered on the **Accura Webmon active user list download**, which defaults to once every 10 minutes. Previously these emails were triggered either by homepage views or the Webmon pending requests interval which is typically set between 1-3 seconds, causing high website load. Provided Accura's Webmon link is running for a 30-minute window after the expected time for the email to be sent, it will trigger. Failing this, the email will not trigger again until the following day. It should be noted that if the account list download is disabled in Web Console by setting 'Check for active users lists every (seconds, 0=never) then ALL automated emails will be disabled including the tests for a working Accura link and requests that have failed PayPal payment

**CHANGE:** Extensive code refactoring and rewrites have been made to the automated and on-demand email capabilities of the website which may bring about undocumented changes

**FIX:** The 'outstanding requests approval reminder' email did not work as expected on multi-domain websites

## Custom Clean-up URLs

The **Remove old requests** and **Remove old baskets** actions listed in Admin accounts & products can be run with a user-specified number of days instead of selecting from the 30, 60 and 90 day options available. After logging into the Admin area, enter a direct URL after your website domain specifying how old in days the data should be to get deleted

For example, to remove requests over 7 days old you would run this URL:

`/remove_old_requests_action?days=7`

And to remove basket items over 7 days old you would run this URL:

`/remove_old_basket_items_action?days=7`





## Admin Area: Accounts

**CHANGE:** The client branding accounts tab no longer displays the client code or name, as this was pointless information when you already know which client you are editing

**CHANGE:** The layout of the Admin account editing page has been tidied up and now displays account images properly

**CHANGE:** Deletion of accounts has been substantially revised to remove all associated data that is safe to delete. Previously, large amounts of orphaned data were left behind when accounts were deleted by web-disabling contacts in Accura. Some account data has to be left behind to allow artwork thumbnails to appear correctly in store orders that have been processed via Accura

**CHANGE:** The upgrade script that runs during website upgrades will now test for and remove orphaned data left behind where accounts have been historically removed via Accura

**CHANGE:** Extensive code refactoring and rewrites have been made to the accounts area of the website which may bring about undocumented changes

## Admin Area: General

**CHANGE:** The Admin 'check payments' table has been visually improved by adding spacing

**CHANGE:** The 6.20 upgrade script (which appears in the Admin settings area directly after an upgrade and disappears once it has been run successfully) can now be run manually when it is not displayed in the Admin settings page. This will execute all of the upgrade script settings relevant to the very latest version, such as recreating 6.20 email templates, running database maintenance and do on. Previously it was necessary to edit the config.yml file to enable debug mode and then restart the website, now it can be done via the direct URL:  
`/upgrade_database?debug_ui=true`

**FIX:** The menus list page control 'quantity per page' did not work as expected making it impossible to move menus items up or down if they were at the top or bottom of the current page

**FIX:** Check-box settings at domain-level that do not apply to clients were being created during client branding settings save, which could cause unexpected behaviour on the website. Any invalid settings caused by this bug will be removed during the upgrade

## Rails Caching Preview

**Rails caching** is a **performance improvement** that caches frequently accessed data on the web server so it can be read from cache instead of created from scratch every time the same website request occurs. Caches of various aspects of the website are built-up over time through general end-user usage, so the website should get faster over time as more end-user requests can be fetched from the cache

There are many forms of cached data. One example would be the list of products and their corresponding filter values (group, category, size etc.) displayed for a specific client account which is based on the products the account is able to see, and extracting all of the group, category, size (and so on) values from these products to build the list of filters. Without caching, the product and product filter lists are built from scratch every time the account goes to the products page, which incurs a significant delay. Once this data has been cached, then future visits to the store page by the same account will load faster. Other areas that are cached include quotes, orders and proofs

Caching is a *preview feature* in the 6.20 release (similar to the new widget design supporting 8 colours), meaning it has not been fully tested when enabled. Caching will be disabled by default during upgrades, but can be manually enabled by Accura support by setting the cache enabled: true option in config.yml

This feature will be fully documented and tested in a future release, which will enable the cache by default

