



Version 6.14 Release Notes

Accura 6.14 Build 3 compiled on 14th June 2022

Accura Online 6.20 Hotfix 2 compiled on 1st February 2022



Introduction

Welcome to Accura Version 6.14

Version 6.14 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.

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.



Contents

Changes in Accura 6.14 Build 3 (14th June 2022)	6
Client and Supplier	6
General	6
CRM	6
Stock Control	6
RDC	6
Estimating	6
Purchase Ordering	6
Order Processing	6
Sales Invoicing	7
Delivery Notes	7
Accura Online	7
Changes in Accura 6.14 Build 2 (22nd March 2022)	7
Delivery Notes	7
Changes in Accura 6.14 Build 1 (15th March 2022)	7
Email, SMS and Fax	7
AccuraSync	7
Stock Control	7
Accura Online	8
Sales Invoicing	8
Changes in Accura 6.12 Build 7 (1st February 2022)	9
Email, Fax and SMS	9
Order Processing	9
Purchase Ordering	9
Stock Control	9
CRM	9
AccuraShip	9
AccuraSync	9
Accura Online	10
Changes in Accura 6.12 Build 6 (16th December 2021)	11
General	11
Email, Fax and SMS	11
Client and Supplier	11
Estimating	11
Order Processing	11
Purchase Ordering	11
EasyPost	12
AccuraSync	12
Accura Online	12
Changes in Accura 6.12 Build 5 (25th November 2021)	13
Estimating	13
Order Processing	13
Stock Control	13
Job Costing	13
Sales Invoicing	13
RDC	13
Scheduling	14
AccuraSync	14
Accura Online	14
Changes in Accura 6.12 Build 4 (2nd November 2021)	15

UK: +44 (0)23 8024 0470

US: +1 (0) 8473 938 731

© Data Design Services Ltd Jun-22



@ support@accuramis.com

➔ www.accuramis.com

Page 3 of 31

Clients and Suppliers.....	15
Tables	15
Estimating.....	15
Delivery Notes.....	15
Invoicing.....	15
Purchase Ordering.....	15
Stock Control	15
Job Costing.....	16
Changes in Accura 6.12 Build 3 (18th October 2021)	17
Email, SMS and Text	17
Estimating.....	17
Order Processing.....	17
Accura Online	17
AccuraSync	17
XML Toolkit.....	17
Changes in Accura 6.12 Build 2 (12th October 2021)	18
Email, Fax and SMS.....	18
Estimating.....	18
Stock Control	18
Purchase Ordering.....	18
AccuraSync	18
XML Toolkit.....	18
Changes in Accura 6.12 Build 1 (7th October 2021)	19
General.....	19
Tables	19
Email, SMS and Fax.....	19
Client and Supplier	19
Estimating.....	19
Order Processing.....	19
Purchase Ordering.....	20
Stock Control	20
Delivery Notes.....	21
Job Costing.....	21
Invoicing.....	21
CRM	21
RDC.....	22
EasyPost.....	22
XML Toolkit.....	22
AccuraSync	23
Accura POD.....	23
Accura Online	23
Changes in Accura Online 6.20 Hotfix 2 (1st February 2022).....	24
Products / Store	24
Miscellaneous.....	24
Admin Area.....	24
Quotes & Orders.....	25
Accura Data Sync	25
Technical	25
Changes in Accura Online 6.20 Hotfix 1 (4th November 2021).....	26
Products / Store	26
Checkout / Addresses.....	26
Miscellaneous.....	26
Changes in Accura Online 6.20 (11th October 2021)	27
Address Areas (Checkout & My Account).....	27



Website Searches.....	27
Mobile Responsive Support.....	28
Retina Image Creation.....	28
User Images Folder Support.....	28
Online Help.....	28
User & Admin Products.....	29
Custom Product Filter URLs.....	29
Emails, Automated Reminders & Clean-ups.....	30
Custom Clean-up URLs	30
Admin Area: Accounts	31
Admin Area: General	31
Rails Caching Preview.....	31



Changes in Accura 6.14 Build 3 (14th June 2022)

Client and Supplier

FIX: Supplier database contacts did not display correctly when linking them to an office.

General

FIX: You were able to deselect all packaging items from being a Default, this will now automatically select the top item as the Default.

CRM

FIX: Creating a new sales opportunity would cause a run time error and crash accura.

Stock Control

FIX: Validation error with Invoice required checkbox within product pricing when producing works orders.

FIX: When editing an existing materials batch, lines were being incorrect removed from the batch if the material was stock controlled and didn't have enough on-hand stock.

CHANGE: Added MTL:Markup field for Stock reporting.

CHANGE: Added MTL:ExternalRef field for Stock reporting.

FEATURE: Purchase Order number has been added to the stock maintenance window for stock receipts.

RDC

FIX: Couldn't view completed RDC activities unless you had an active operation, can now be viewed/edited on completed jobs.

Estimating

FIX: Ghosting UI issue within workings > labour when raising brand new quotes.

FIX: When creating a summary wizard stock report the field MTL:Location is always truncated to 6 characters regardless of any changes made in the settings.

CHANGE: The Ink table now has the option to use queries to better select a specific ink based on the criteria required.

Purchase Ordering

FIX: Receiving Stock was made available in Purchase Ordering module without having the Stock Module active.

FIX: Partial purchase order receipt and invoicing behaviour corrected. PO now remains open after partially invoicing in order to either receive or write off remaining balance.

FEATURE: Supplier job-ref and processed date within a purchase order will now be posted to chosen location within Defaults/XML With XML multi company data transfer enabled.

CHANGE: When raising a Purchase Order from within an Order it will now use the Order Items description as opposed to the Product description.

Order Processing



CHANGE: The email template for job-tickets now includes the following fields in the body of the email: Client, Job-No, Order-No, Quantity, Title, Date-in and Required.

FIX: Importing a multi-drop delivery from a file, didn't change the **Pack-Type** to match what was supplied in the file.

Sales Invoicing

FIX: When a delivery is added to the sales invoice as a separate item, the selected tax-code did not include the tax district if this was populated.

Delivery Notes

FIX: Delivery notes were not retaining the custom package details after being saved.

Accura Online

FIX: Opening the web console for a second time with the console minimised in the system tray would prompt an exception error.

Changes in Accura 6.14 Build 2 (22nd March 2022)

Delivery Notes

FEATURE: Address validation option now available within delivery notes for Easypost enabled accounts.

Changes in Accura 6.14 Build 1 (15th March 2022)

Email, SMS and Fax

FIX: Custom SMTP settings in client and supplier Email Broadcasts were being ignored.

CHANGE: Chromium email engine improvements have been made. We will now utilise Microsoft Edge Web2View and will require this to be installed in order to retain full functionality for the login screen and email windows within the program when using the transport method of SMTP. Web2view is installed natively on Windows 10 machines, but if it is not found on the operating system, you will be prompted to do so in Accura with a direct link.

CHANGE: MTL: Location is now no longer updated by running a manual stock balance. It will only be updated by stock receipts, issues, journals, transfers, movements or reconciliations.

AccuraSync

FEATURE: It is now possible to auto-import currencies and tax rates by switching the option on for each in the Accounts Config app. Once on, all records not previously imported into Accura will be imported without the need for mapping. This also means new currencies and tax rates added to the accounts platform will automatically be imported into Accura. This feature has been added primarily for syncing with QBO - US version due to the complex American taxation system.

CHANGE: Zipp Code field is now mandatory on invoiceable records for USA systems where AccuraSync and Quickbooks are enabled.

Stock Control

📞 UK: +44 (0)23 8024 0470

📞 US: +1 (0) 8473 938 731

© Data Design Services Ltd Jun-22



@ support@accuramis.com

➡ www.accuramis.com

Page 7 of 31

CHANGE: A stock replenishment work order is no longer created automatically in order to fulfil a stock-controlled product order with a stock qty which falls short of the order qty. This will need to be created manually.

Accura Online

FIX: Pre pay replenishment work orders for products placed through Accura Online where payment method = Paypal were not being correctly validated to remove pre-payment flag.

Sales Invoicing

CHANGE: If invoice has now been incorrectly set as "paid" by user, invoice status can now be rectified as long as Accurasync has not been enabled and/or invoice has not been synced to the accounts package.



Changes in Accura 6.12 Build 7 (1st 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.

CHANGE: MTL: Location is no longer updated by running a stock balance. It will only be updated by stock receipts, issues, journals, transfers, movements or reconciliations.

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 (16th 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 (25th 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 (2nd 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 (18th 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 (12th 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 (7th 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.

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.



Changes in Accura Online 6.20 Hotfix 2 (1st February 2022)

Products / Store

FEATURE: Added support for Accura product descriptions containing HTML coding. HTML is now converted to pure text where required for correct website functioning

CHANGE: Improved handling of product list filter accordions to prevent ticked filters from being hidden by collapsed accordions

FIX: Product list applied filter browser cookies in error when URL parameters were present, resulting in potential empty lists

FIX: Product owner filters displayed the 'all products' option when all client owned products were filtered out by the use of other filters

FIX: Product owner filters were enabled when public products existed but were all suspended status

Miscellaneous

CHANGE: Removed large proof image preview and clarified function of proof download button on proof view page to avoid user confusion

CHANGE: B2B password and activation forms UI standardised to match the login form style

CHANGE: Minor UI changes and fixes to the various password and activation forms

FIX: Changing passwords for users or admin accounts could result in bad URL navigation, such as resetting the Admin dashboard to the first domain, losing the current tab in My Account, jumping out of client branding and in one scenario crashing the website

Admin Area

FEATURE: Added subref field tokens {{subref}} and {{subref_bold}} to request, order, delivery and invoice email notifications. Added delivery_email {{delivery_email}} to request email notifications. These new fields can now be applied using the Email notifications editors

FEATURE: Admin accounts list now supports search on the account id and client_id values

CHANGE: Improved admin accounts list record selection to work on full row select instead of clicking directly on data values

CHANGE: Admin product link & landing page filters are now hidden when they have no entries to display. If all filters are hidden the 'select filter options' area will disappear

CHANGE: Admin product basket item lists description column is now truncated to a maximum of 50 characters to improve layout

CHANGE: Updated the hidden Admin offices list with client name and office address columns

FIX: Resolved various issues with page navigation on the client branding accounts tab

FIX: Client branding accounts tab could display an empty list after previously viewing a client with multiple pages of accounts

FIX: Admin product link & landing page filters did not appear when editing data that was previously saved before the 6.20 upgrade

FIX: Outstanding basket items reminder emails contained product descriptions instead of basket item descriptions

FIX: Fixed issues with creating new offices and editing existing offices from the hidden Admin offices list



Quotes & Orders

FIX: Free delivery was not calculated in print orders or checkout wizard when the initial order value exceeded the default delivery method free price threshold

FIX: Quote, order and request lists tab switching did not work on Abstract theme

FIX: Fixed typo in print order custom delivery address form

FIX: View store order page crashed when products were missing and display product codes was enabled

FIX: Reverted checkout permissions change introduced in 6.11 to potentially improve app stability

Accura Data Sync

CHANGE: Accura order request data sync will no longer send the text "(free if over xx)" in delivery charge information unless the delivery charge was actually free

FIX: Accura order request data sync crashed if orders had missing delivery charge records

FIX: Accura order request data sync sent an erroneous delivery method of 'value' when delivery options were in use. The delivery method is now blank when delivery options are in use

Technical

CHANGE: Removed upgrade support for versions of AccuraOnline prior to 6.03

CHANGE: Technical changes to office paginations to retrofit improvements from rails 6 (version 6.50)

CHANGE: Technical improvements to page navigation controls on accounts, basket items and products

CHANGE: Renamed default session cookie value for rails 6 (version 6.50) cross compatibility

CHANGE: Removed unused https_protocol port setting from config.yml documentation

FIX: Cookie prefix setting in config.yml was not documented correctly

FIX: Retina image actions in Admin settings should not appear on new databases

FIX: Debug text appeared on Finish your Upgrade section in settings between upgrading the database and creating retina images

FIX: Resolved various website issues reported by automated crash reports



Changes in Accura Online 6.20 Hotfix 1 (4th 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 (11th 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

📞 UK: +44 (0)23 8024 0470

📞 US: +1 (0) 8473 938 731

© Data Design Services Ltd Jun-22



@ support@accuramis.com

➡ www.accuramis.com

Page 28 of 31

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

