



## **Version 6.14 New Features**

*Accura 6.14 Build 3 compiled on 14<sup>th</sup> June 2022*

*Accura Online 6.20 Hotfix 2 compiled on 1<sup>st</sup> 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](mailto:support@accuramis.com).

## About This Document

This **New Features** document details all the major features added to Accura and AccuraOnline since the last major public releases, which were Accura 6.03 Build 5 and AccuraOnline 6.11.

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

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

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



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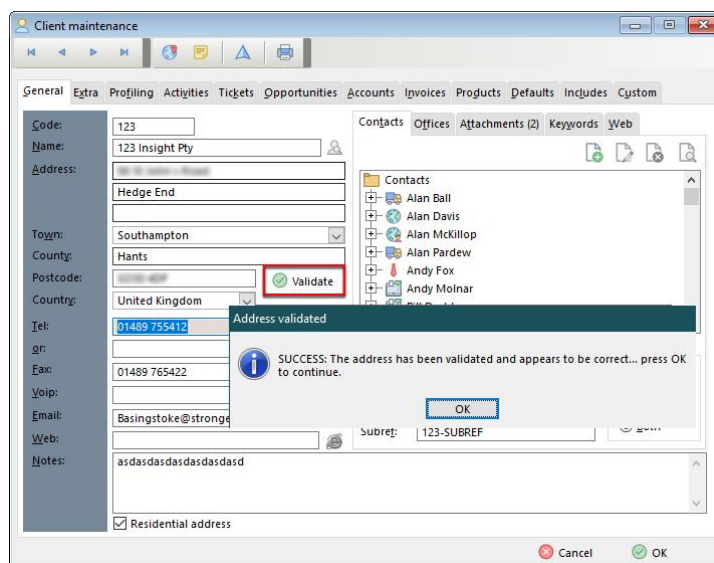
## New Features in Accura 6.14 Build 3

### AccuraShip Address Validation

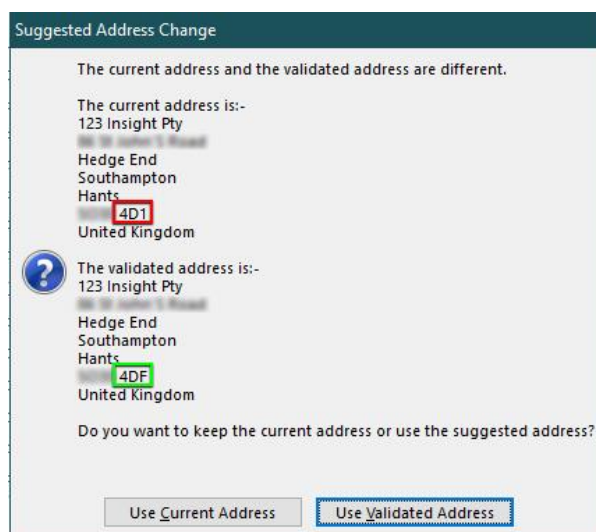
We have added address validation in various places when AccuraShip is installed, the button will be disabled if it is not installed. This will ensure that addresses are valid when originally entered, instead of at delivery stage.

You will be able to see this button in the following areas of Accura:

- Orders – Delivery tab
- Quick Orders – Delivery tab
- Delivery Notes
- Client, Supplier and Offices databases



**Note:** The button uses the EasyPost address validation API, and will offer to correct the address if applicable.



**Note:** While the address validation will work with UK addresses it is recommended that you review any address changes before proceeding.



## New Features in Accura 6.14 Build 1

This is a maintenance release of Accura containing bug fixes, further development of our Chromium email engine and some small feature additions. These are detailed comprehensively in the accompanying release notes.

### AccuraSync Quickbooks USA



We have now been able to include support for QuickBooks USA Intuit in this latest version of Accura, more information regarding feature changes relating to this can be found in the accompanying release notes.

Service	Days	Code	% Markup	Active?
<input checked="" type="checkbox"/> 1stClass	1	1stClass	0.00%	<input checked="" type="checkbox"/>
2ndClass	1	2ndClass	0.00%	<input type="checkbox"/>
InternationalBusines	5	InternationalBusines	0.00%	<input checked="" type="checkbox"/>

☒ Default

## New Features in Accura 6.12 Build 7

### Carrier Service Selection

Some carrier APIs that are available for the AccuraShip (EasyPost) module return all of the carrier services, regardless of whether some of those services are applicable to you, the end-user.

It's now possible to prevent unwanted services returning rates in AccuraShip. This is done by unticking the **Active** flag against the unwanted services in Shipping defaults. These can be found by going to *Setup - Defaults - Shipping*.

### Carrier Service Custom Mark-ups

When a carrier service is booked for a delivery note and an outwork delivery charge is added, the outwork's default mark-up is applied which can then be amended manually. If an AccuraShip booking is made for a delivery note by an RDC user, they may not know what mark-up to add or have the authority to change the default value.



Now, using **carrier service custom mark-ups**, different mark-ups can be applied to different services for individual carriers.

**Carriers:**

Name	Identifier	Route	Custom MU?	Format	Size	Prefix1
DHL Express Account			<input type="checkbox"/>	PDF	4x6	
Parcel Force Account			<input type="checkbox"/>	PDF	4x6	
<input checked="" type="checkbox"/> Royal Mail			<input checked="" type="checkbox"/>	PDF	4x6	

☒ Default

Service	Days	Code	% Markup	Active?
RoyalMail1stClass	1	RoyalMail1stClass	0.00%	<input type="checkbox"/>
<b>RoyalMail24</b>	<b>1</b>	<b>RoyalMail24</b>	<b>15.00%</b>	<input checked="" type="checkbox"/>
RoyalMail2ndClass	1	RoyalMail2ndClass	0.00%	<input type="checkbox"/>

☒ Default

To start, tick the **Custom MU?** checkbox against the carrier you want to use custom mark-ups for. Once enabled, the **% Markup** field becomes available for each of the carrier's services. You can then mark-up services at different levels.

When a service is booked, its custom mark-up will be applied to the outwork charge.

Delivery-code:	COURIER	Delivery by courier
Delivery cost:	£12.47	<input type="checkbox"/> Add delivery cost-entry to order(s)
Markup:	15.00%	<input checked="" type="checkbox"/> Add delivery as extra on invoice
Charge:	£14.34	

Please bear in mind that when using custom mark-ups, a 0% is a valid value mark-up so make sure all the services for the affected carrier have appropriate mark-ups.



## New Features in Accura 6.12 Build 1

### Chromium Embedded Framework

We have come across certain issues when using the Internet Explorer plug-in we embed within Accura. This plug-in can be called when opening web pages from in Accura such as Online Help or the LinkedIn link, to embedded frames such as the route planner or AccuraShip tracking details.

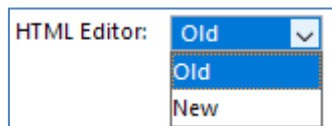
We have long had a solution for these issues but have had to hold off due to the need to keep backwards compatibility with customer systems where PCs and operating systems are not kept up-to-date. However, with Internet Explorer being deprecated and no longer supported by Microsoft, we now need to implement a more modern and future proof internet plug-in using the Chromium Embedded Framework (CEF).

Despite what the name suggests, CEF does not necessarily require Chrome to be installed on the PC, it should run with no browser at all installed as we ship the necessary files in the 6.12 upgrade.

To all intent and purposes, end users should not notice much difference in day-to-day operation. As we now use CEF, we've been able to upgrade the built-in HTML editor to CKE4 which fixes long standing bugs that were part of CKE3.

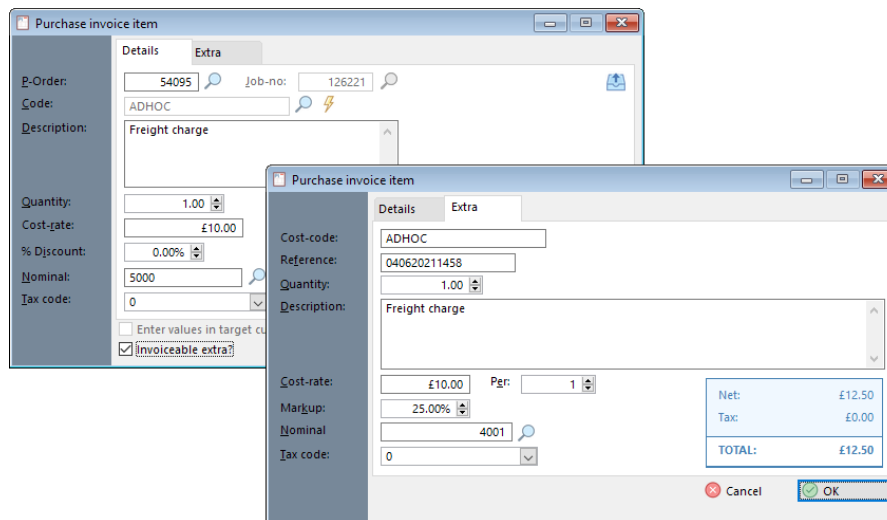
On upgrade to 6.12, Accura will turn on CEF depending on the hosted operating system. If it determines the operating system is less than Windows 7, the old-style plug-in will be used. For Windows 7 and above, the CEF control will be used. However, this does not necessarily mean the CEF will work well on older systems and operating system that fall below our recommended operating system, **64-bit Windows 10** (or similar server O/S for RDS installations). Please see our minimum system requirements for further details.

If any problems occur on a PC-to-PC basis that can't be resolved by Support then it may be necessary to switch the problem PC back to using the old IE plug-in. This can be done from Accura's *Defaults > Email* window or the *Communication > Setting* window. Unfortunately doing so means that the issues resolved by the implementation of CEF will return.



# Purchase Invoice Extras

Occasionally, suppliers can add extra charges to a purchase order that is only raised at the purchase invoice stage. For example, a paper merchant charges an unforeseen freight charge for a specially ordered material or an outwork supplier may charge extras for work that wasn't included in the original PO.



In the event of a supplier adding an unexpected charge to a purchase invoice, we have now added the ability to create order extras from purchase invoices.

A purchase invoice extra is created by simply adding a new purchase invoice item, select in the parent purchase order and add a related item from your tables. For example, you might want to select in a generic freight outwork item to cover a freight cost added by the supplier.

Next you need to tick **Invoiceable extra?** which will then take you to the PI item's **Extra** tab where you can change the sell values as you would in a standard order extra. Once the PI extra and PI have been saved, the additional cost(s) will automatically be added to the job costing.

## Carrier Default Packing Types

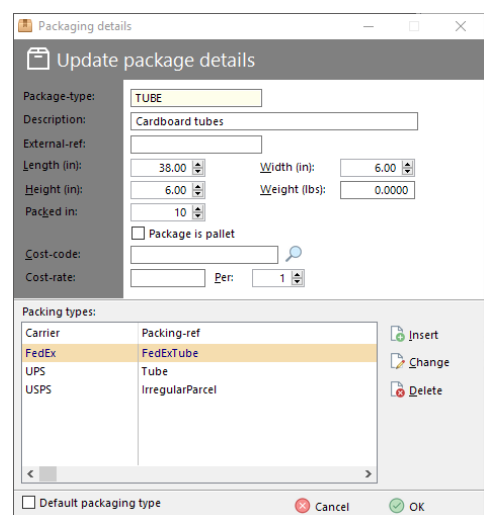
Accura packaging types now support **carrier default packing types**. This allows AccuraShip to query carrier APIs using their own preferred packing types.

For example, you may wish to use a generic tube package type for packaging as setup in Accura. FedEx, UPS, and others use their own identifier codes, and dimensions for their standard pre-defined "tubes". Therefore, we need to send a different packaging-type code to each carrier.

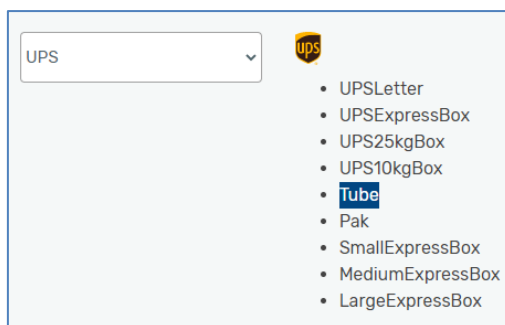
This new feature allows you to select one packaging type in Accura for an order or delivery but send multiple carrier-specific identifier codes during EasyPost calls (to get proper comparison rates from different carriers)

To set up carrier packing types, go to **View Packaging Types (Setup - Packaging)** and **Change** your desired record.

In the **Packing types** section, click **Insert** and browse for one of your Carriers.



Next, tab across to **Packing ref** using the carrier's **predefined package code**. The correct carrier codes can be found here <https://www.easypost.com/docs/api#parcels>



When an AccuraShip request is made to EasyPost, where a carrier packing types is available for the delivery note's selected packaging type, the carrier response will be for their predefined package type. If a queried carrier has no predefined package type, the Accura packing type values will be used.

There are a couple of points to note-

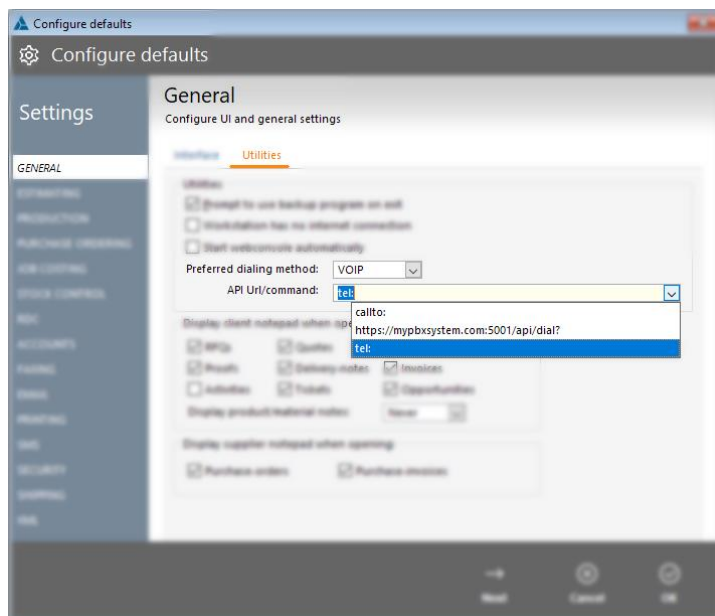
- Only one predefined package type per carrier can be linked to a single Accura packing type
- Not all carriers support predefined packaging type, this is something beyond our or EasyPost's control.

Please also see the 6.12 Technical Release Notes regarding known issue when using carrier packing types.

## Improved VOIP Compatibility

In order to support more modern PBX/ VOIP phone systems, we have introduced the ability to customise the VOIP API call. This will make VOIP dialling more compatible with modern PBX systems which do not support the old **callto:** API call which seems to have been replaced by **tel:** in some instances.

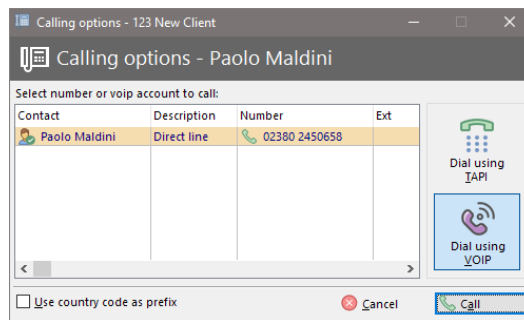
The new API/URL setting can be found in Accura Defaults, on the **Utilities** tab of the **General** section (*go Setup > Defaults*).



When Accura dials using the VOIP, it will prefix the number with the specified URL or command which should then connect to your preferred phone system.

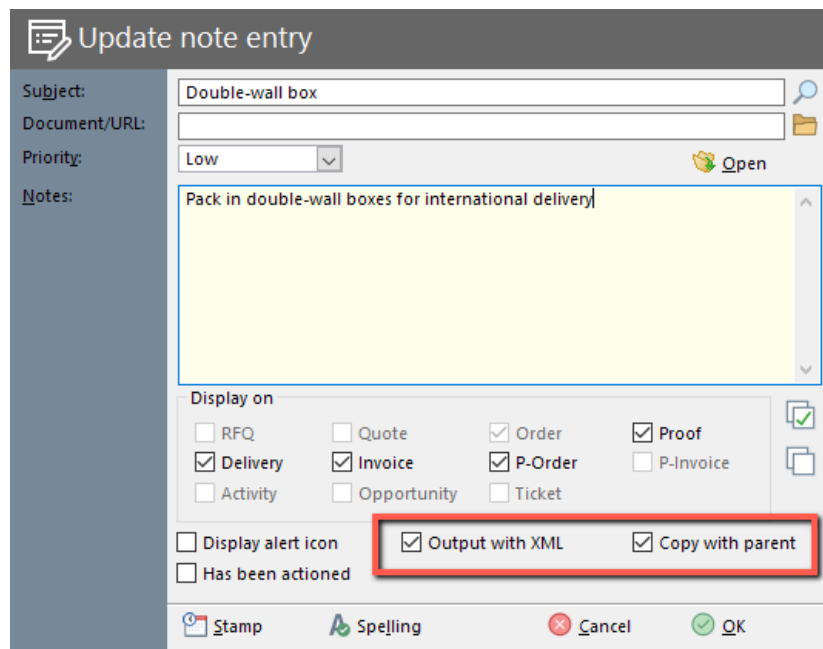


The **callto:** and **tel:** entries will be automatically created during the upgrade to 6.12. New entries can be typed directly into the dropdown. When tabbing out of the field Accura will ask if you wish save the new entry. These entries can also be created or edited in **List Options** (*Setup > List Options*) under the **INI:DialURL** category



## Improved Note Control

Pop-up notes now have a couple of new options to govern behaviour for notes attached to quotes or orders.



The first is **Copy with Parent** which when ticked, means the note will be copied if the quote or order are copied. If unticked, the note will **not** get copied forward to the new quote / order. This means notes that may only be relevant for this particular quote or order can be prevented from copying forward thus avoiding confusion. This option is always ticked by default.

The second option, **Output with XML**, is available in systems where the **XML Toolkit** has been purchased. This option will determine whether or not individual notes are output with quote or order XML.



## New Features in Accura 6.11 Build 1

### Carrier Custom Defaults

Our EasyPost export format supports two custom fields, which may or may not be supported in turn by individual carrier APIs.

In order to increase compatibility with the carrier APIs, it is now possible to select different custom values for each carrier from a range of delivery related fields.

Name	Id	R	Format	Size	Prefix1	Custom-ref	Prefix2	Custom-ref2
PDX-FedEx			PDF	4x6	DN	ORD		
PDX-UPS Account			PDF	4x6	Ref:	DN	Parcel #	PARCEL

Service	Days	Code
FEDEX_2_DAY	4	FEDEX_2_DAY
FEDEX_2_DAY_AM	4	FEDEX_2_DAY_AM
FEDEX_EXPRES	5	FEDEX_EXPRESS_SAVER
FEDEX_GROUND	3	FEDEX_GROUND

In the Carrier defaults (*Set-up > Defaults > Shipping*) The **Custom Ref** fields are set to the desired field settings. The fields available are – Delivery Number, Job Number, Order Number, Subref and Parcel Numbers.

Each carrier can then have their own preference set. If the Custom fields are set to **Default**, they will inherit the shipping default field settings. Otherwise, each can be selected from the list of available fields.

It is also possible to define how the Custom ref fields are prefixed for each carrier by editing the **Prefix**. This value can be left blank if no prefix is required.

### Invoice Due Date Advancing

To increase support for external accounts platforms, specifically QuickBooks Online, it is now possible to advance the due dates for sales and purchase invoices to the next month for payment terms that specify a fixed day of the month if the due date is a set number of days before the usual day of the month.

Terms (no. days/date): 28  
Terms based on: Day of this month  
Advance to next month if due within (days): 10

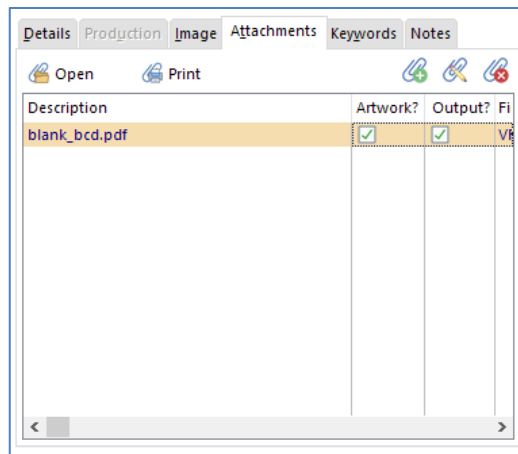
For example, a client's payment terms are to pay by 28<sup>th</sup> day of this month. Using the new **Advance to next month if due within** setting, we can now defer this due date to the following month if the invoice was raised with a certain number of days before the usual due date of 28<sup>th</sup> of this month.

Using the above example, if I raise an invoice for the client on 21<sup>st</sup> of the month I am within the 10 days deferral period so the due date of any invoice raised will roll over until the 28<sup>th</sup> of next month.



# Product Attachment to Order Sync

It is now possible to output a product's attachment(s) to an order containing said product. This is useful when a product has artwork or a file that needs to be referenced in an order.



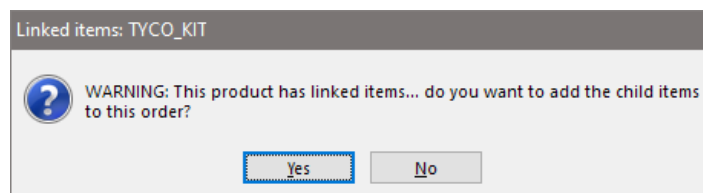
To set a product's attachment to behave in this manner, its **Output?** checkbox should be ticked. When this product is then used in an order or web order, it will create an attachment record referencing the original file in the *Accura\Data\Attachments\Stock* folder. A copy will **not** be made in *Accura\Data\Attachments\Order* folder to prevent unnecessary creation of the same file multiple times on disk.

General	Order Items	P-Orders	Proofs	Attachments (1)	Activities	Delivery	Invoicing	User-fields	History
Filename	Output	Prompt	Artwork	Copy?	Source				
VF_PROD_1_3401.pdf	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	D:\Accura\C10\Data_Xero\attachments\stock\VF_PROD_1_3401.pdf				

## Bill of Material Products

In previous versions, web orders containing products that had a **bill of materials** (BOM) would not pull through the product's child items as offline orders would. In Accura 6.10 this has been changed.

Now if a web order contains a product that has a BOM, the user will be prompted to add child items when processing the order.



If Yes is answered, all linked items to the product will be pulled through into the order - labour, materials, outwork and other products.



## BOM Products as “Kits”

Using product bill of materials allows for a kind of rudimentary “kit” feature although it is not intended to be a fully-fledged kitting feature; this is in the roadmap for a future version.

For example, you could set up a BOM product parent “kit” product with a list of other products as child, linked items. The customer will then order the “kit” and receive all the components that constitute the “kit”.

A parent “kit” product would be created and on the **BOM tab**, the child products or “kit” components can be added.

The screenshot shows the 'Stock maintenance' window with the 'BOM' tab selected. The table lists child products for a parent kit. The first row is highlighted.

Code	Description	Base-qty	Qty	Rate	Per	Prompt?	Invoice?
TYC001	Letterheads - Market Har	Parent	500.00	3,067.6000	1.00	<input checked="" type="checkbox"/>	No
TYC002	Letterheads - Aberdeen	Parent	500.00	4,049.2000	1.00	<input checked="" type="checkbox"/>	No
TYC003	Letterheads - Skelmersda	Parent	500.00	56.2375	1.00	<input checked="" type="checkbox"/>	No
TYC005	Compliment Slips	Parent	500.00	56.2375	1.00	<input type="checkbox"/>	No
TYC010	Business Cards	Parent	250.00	12.2700	1.00	<input type="checkbox"/>	No
TYC020	Sales Order Sheet	Parent	500.00	12.7813	1.00	<input type="checkbox"/>	No
TYC021	Purchase Order Sheet	Parent	500.00	14.2639	1.00	<input type="checkbox"/>	No
TYC022	Statement Sheet	Parent	500.00	14.3150	1.00	<input type="checkbox"/>	No
TYC030	Order Folder - Orange	Parent	50.00	19.6320	1.00	<input type="checkbox"/>	No
TYC031	Order Folder - Blue	Parent	50.00	38.3438	1.00	<input type="checkbox"/>	No
TYC032	Yellow Folder	Parent	50.00	79.7550	1.00	<input type="checkbox"/>	No

On the right, the 'Link-type' section has radio buttons for Materials (selected), Labour, Outwork, and All. There is also a 'Manage' button.

When selected in, the quantity of child products will default to their own sell pack quantities and each one can be set to optionally prompt to be added or pulled in silently.

If components can be sold as products in their own right and are invoiced as such, when they are used as child products, they can be set not to be invoiced when they are part of a “kit”. This is done in the BOM links as per the image above where the values in the **Invoice** column are set to No This way at invoicing stage, only the parent product is invoiced, not all the component parts.

When delivering “kits”, all stock-controlled items will be listed as well as any other materials where their order item invoiced required flag is set to true. This is so stock controlled components and other materials can be issued from stock correctly when raising the delivery note.

## Product Order Commission

It is now possible to add commission to product orders. Previously it was only possible to calculate commission for orders that were quoted.

Existing commission plans can be used but products to be set up correctly with cost and sell prices for some commission plan types to work correctly.

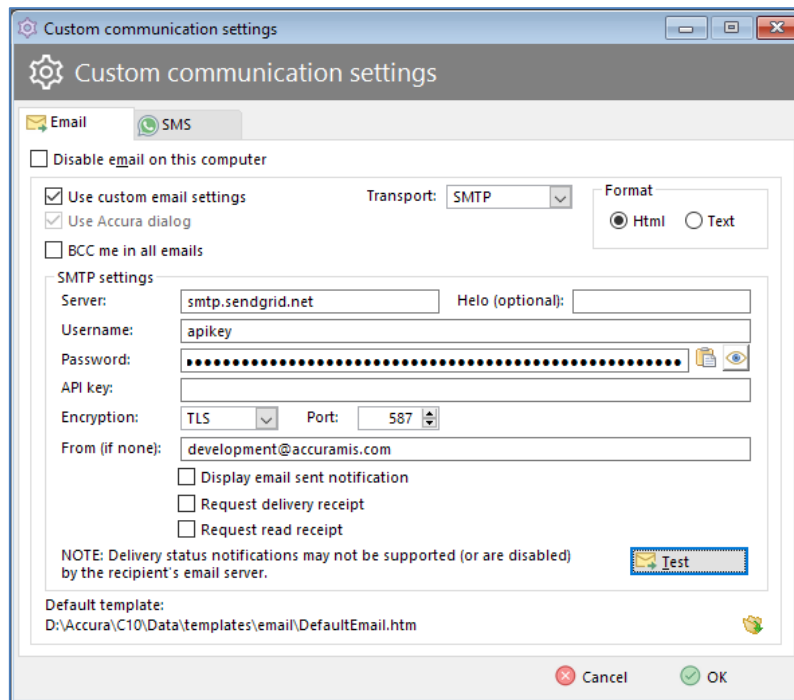
As well as being able to use commission plans, a commission value can be targeted too.

The dialog box shows 'Comm-code' set to '10PC' and 'Commission' set to '£8.00'. There is a 'Custom?' checkbox which is currently unchecked.



# SendGrid Compatibility

To allow continued use of the SendGrid email platform, usually used for mass e-shot, we now support the use of their API. In order to use SendGrid, your email settings must be set up in a specific way.



- Server should be the SendGrid server i.e., smtp.sendgrid.net
- Username should be **apikey**
- Password should contain your SendGrid **API Key**
- The API key field should be left **blank**
- Encryption should be TLS using the **587** port

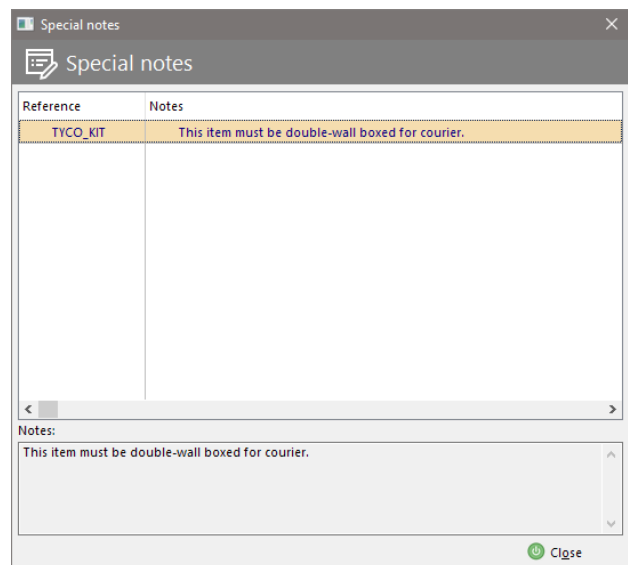
If using SendGrid for day-to-day emailing, Accura users should have their email addresses within Sendgrid's list of authenticated users.

## Material Notes

Material notes can now optionally be displayed as a read-only, pop up notes. This may be useful when certain materials need handling in a specific way or products that need packaging in a certain manner.

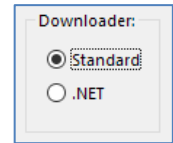
This is controlled by a setting in *Defaults > General > Utilities* by selecting the desired behaviour from the drop-down menu for **Display product/material notes**.

- **On-order** – notes will display when used in an order
- **On issue** – for products only, notes will display when they are issued by raising a delivery note.
- **Always** – will always display as both the above settings.
- **Never** – material/products notes will never display.



# Web Console Downloader

The **Standard** downloader that web console uses to download eDoc artwork and attachments from Accura Online has been overhauled and improved. Testing has shown it is now more reliable than ever and quicker in operation than the .NET downloader. Therefore, we recommend that the downloader is set to use the Standard version.



To do this, open web console and go to *Setup > General*. Change the radio button setting to **Standard** and click **Save** on the left. The web monitor service on the server should then be restarted.

## Accura Online Help

With Adobe Flash being deprecated in January 2021, the video section of our online help has become unusable. These videos are being replaced and added to the **FAQ section** of our **Customer Portal**.

To access the Customer Portal, you will need to log on [here](#) with your log in details. If you do not have log in details, you can ask our support team to [activate your account](#). You will then receive an email with your details.

The Online Help site is still available from your Accura help menu but only our wide range of "How to..." PDF guides are viewable as well as other documents such as hardware specifications and previous release notes.



## New Features in Accura Online Version 6.20

### Large Address List Support

Address (Accura office) lists in the **My Account Addresses** tab, **Checkout Wizard Billing** step and **Checkout Wizard Delivery** step have been overhauled to handle hundreds of addresses for large B2B clients in an efficient, user-friendly way that avoids huge scrolling lists, and provides full control of which addresses can be seen by each account. These features will automatically be enabled on client accounts with multiple addresses. B2C accounts and client accounts with single addresses will not see these new features unless they add multiple addresses over time

- The address list becomes **multi-page** with standard **page navigation** controls to control the page number and number of addresses per page
- **Address searches** and **sort orders** are available at the top of each address list. The text cursor always defaults to the address search box to avoid having to click on it
- The currently selected address will always appear above the address list search and sort header so users no longer need to search for it

#### Checkout Wizard Billing Step

##### Billing Details

###### Contact:

Jeff Botwood



###### McDonald's Southampton Esplanade

Harbour Parade  
West Quay Retail Park  
Southampton  
Hampshire  
SO15 1BA

✓ Current Billing Address



Search addresses



Sort by:

Name (asc)



###### 7DAYS - 7 Days Pizza And Chicken

51 St Mary's Road  
Southampton  
Hampshire  
SO14 0BH

###### BURGER - Burger King

98 Above Bar Street  
Southampton  
Hampshire  
SO14 7DT

###### DDS-001 - Data Design Services Ltd

Lakesbury Mews  
Hiltingbury Road  
Chandlers Ford  
Eastleigh  
Hampshire  
SO53 5SS

###### KFC SOUTH - KFC Southampton

127a Above Bar Street  
Southampton  
Hampshire  
SO14 7FN

###### TACOBELL - Taco Bell

1-2 Hanover Buildings  
Southampton  
Hampshire  
SO14 1JU

###### TEXAS - Teaxas Grill

50-52 Bevois Valley Road  
Southampton  
Hampshire  
SO14 0JR

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UK: +44 (0)23 8024 0470

US: +1 (0) 8473 938 731

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@ [support@accuramis.com](mailto:support@accuramis.com)

[www.accuramis.com](http://www.accuramis.com)

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## Checkout Wizard Delivery Step

### Delivery Details

#### Contact:

Jeff Botwood



#### Data Design Services Ltd

Lakesbury Mews  
Hiltingbury Road  
Chandlers Ford  
Eastleigh  
Hampshire  
SO53 5SS

**Phone:** Jeff Mobile

**Email:** jeff@accuramis.com

**Current Delivery Address**



Add Delivery Address



Use Billing Details



Search addresses



Sort by:

Name (asc)



#### 7DAYS - 7 Days Pizza And Chicken

51 St Mary's Road  
Southampton  
Hampshire  
SO14 0BH

#### BURGER - Burger King

98 Above Bar Street  
Southampton  
Hampshire  
SO14 7DT

#### KFCSOUTH - KFC Southampton

127a Above Bar Street  
Southampton  
Hampshire  
SO14 7FN

#### MCDON - McDonald's Southampton Esplanade

Harbour Parade  
West Quay Retail Park  
Southampton  
Hampshire  
SO15 1BA

#### TACOBELL - Taco Bell

1-2 Hanover Buildings  
Southampton  
Hampshire  
SO14 1JU

#### TEXAS - Teaxas Grill

50-52 Bevois Valley Road  
Southampton  
Hampshire  
SO14 0JR

Page: 1 of 1 | Quantity per page: 6

The **default sort order** for addresses is 'name'; other sort orders are 'address' (the first address line), 'town', 'postcode', or 'code' (the Accura office code)

All settings (sort order, page number, addresses per page and the last search phrase entered) are stored for each user in each of the addressing areas. If you always deliver to the same address for example and entered a search to display that address, it will automatically be highlighted on your next order until you manually clear the search

**Security profile permissions** have been improved in all of the above addressing areas:

- Accura-based offices (which are visible to ALL users of the same client) can be hidden by denying permission to 'View Accura offices' (this used to be called 'View products owned by other offices')
- Offices created by other users via the 'my account' area (such as people's home addresses) can be hidden from other users of the same client by denying permission to 'View data owned by other accounts'

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@ [support@accuramis.com](mailto:support@accuramis.com)  
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## My Account Addresses Tab



**Jeff Botwood**  
ACTIVE

Edit Account

Change Password

Your Addresses

**Default Billing** Edit | Remove

**BURGER - Burger King**

98 Above Bar Street  
Southampton  
Hampshire  
SO14 7DT

**Default Delivery** Edit | Remove

**KFCSOUTH - KFC Southampton**

127a Above Bar Street  
Southampton  
Hampshire  
SO14 7FN

Search addresses

Sort by: Name (asc)

**7DAYS - 7 Days Pizza And Chicken**

51 St Mary's Road  
Southampton  
Hampshire  
SO14 0BH

Set Billing | Set Delivery Edit | Remove

**BURGER - Burger King**

98 Above Bar Street  
Southampton  
Hampshire  
SO14 7DT

Billing | Set Delivery Edit | Remove

**DDS-001 - Data Design Services Ltd**

Lakesbury Mews  
Hiltingbury Road  
Chandlers Ford  
Eastleigh  
Hampshire  
SO53 5SS

Set Billing | Set Delivery Edit

Further **security permission** improvements apply to the **My Account** area:

- Accounts require the 'Manage addresses' permission to be able to create, edit or delete addresses. This is further locked down by the above permissions that determine if the account is able to see Accura-based offices and offices created by other users
- Accounts require the 'View billing details' permission to be able to see their default billing office. This allows accounts to be bolted down properly where the checkout wizard was already configured to skip the Billing step using this same permission
- Accounts require both 'View billing details' and 'Edit billing details' permissions to be able to change their default billing office
- Accounts require the 'Edit billing details' permission to change their default delivery office. Accounts can always view their default delivery office as has always been the case in the checkout delivery step
- Accura-based offices will be displayed at the top of the page if they are set as the account default addresses, even if the account does not have permission to 'view Accura addresses'

See the *Admin Area: Security Profiles* section later in this document for more information on the changes in security profiles in this release



# Checkout and Requests

The checkout wizard displays a **read-only summary** of the billing, delivery and job spec details on the final step, to prevent having to step back through the wizard to check the correct details were entered. Display of billing details require the logged-on account to have the 'View billing details' permission



## Billing Details

### Jeff Botwood

McDonald's Southampton Esplanade  
Harbour Parade  
West Quay Retail Park  
Southampton  
Hampshire  
SO15 1BA

## Delivery Details

### Jeff Botwood

Data Design Services Ltd  
Lakesbury Mews  
Hiltingbury Road  
Chandlers Ford  
Eastleigh  
Hampshire  
SO53 5SS

**Phone:** Jeff Mobile

**Email:** jeff@accuramis.com

## Order Details

Food menus

**Required by:** 21/10/2021

**Sub reference:** ABC12345

**Our ref:** 2434364

The **Priority** and **Respond by** fields in quote, print order and checkout wizard requests have been removed after feedback from customers indicated they were not desirable. Some fields have been rearranged accordingly in the view orders, and view order requests lists

The checkout wizard will enforce the minimum **Required by date** based on the lead times of the products in the basket (if lead times are configured in Accura), or the default store order Admin setting (whichever is the longest), provided a required by date has been selected by the user

Custom delivery information entered into the checkout wizard or print orders now requires entry of both phone and email vales. Previously you could enter either phone or email but did not need to enter both

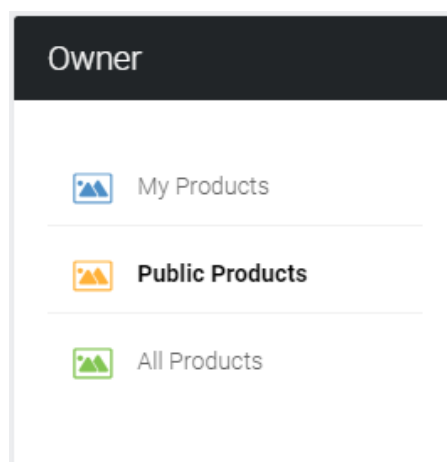
# General Product Features

A **Product Owner** filter has been added to the store, which filters by 'Public Products' (B2C), 'My Products' (owned by the currently logged in client) or 'All Products'. Previously all types of products were always displayed

The filter only appears on B2C systems for logged in clients when there is a mixture of public and client owned products available

The owner filter behaves in the same way as the existing product filters, automatically removing entries that are no longer relevant after applying other filters

The last selected option on the owner filter is stored for each website user as with other product filters



#### Owner filter title

Owner

☒ Owner filter enabled

Owner filter is only displayed if there is more than 1 client and 1 public products in the database, and the logged in client can see public products

To use and configure the Product Owner filter in the **Admin area**, you must be using B2C branding mode

The filter can be renamed and/or disabled via the settings filters tab and client branding filters tab in the same way as the other store filters (see left)

The filter will also appear when linking menus, slides, tiles, profile & account landing pages to the 'Products / Store' link-to option in the same way as the other store filters (see right)

Select filter options (optional)

Owner

Category

☐ Public Products

☐ Min & Max

☐ All Products

☐ No Limits

☐ Quantity Choices

There is a corresponding client branding setting **Hide public products in store** to allow a B2C website to offer public products when not logged in, but remove these products once a client has logged in, rather than force the client to use the owner filter to hide them

☐ Hide public products in store

A new Admin setting **Display product codes in store** allows product codes to be hidden from website users. This setting is also available in client branding. Hiding product codes will affect the following:

- More characters in product descriptions will be displayed
- Product lists cannot be sorted by 'code', and will be sorted by 'description' by default
- Admin product areas will always display product codes regardless of this setting. This is for end-users only

☐ Display product codes in store

## Improved Online Help

Links to the Accura client *Support Portal*, *Email Support* and *Templates Help* (for users with the optional eDocBuilder module) have been added to the **Admin area toolbar** at the top of the browser:



Support portal

Email support

Templates help

What used to be the 'Version' page in the Admin area has been changed to **Online Help**, using a new icon with links to various support resources:

- **How to Get Help** details various help options available such as the Accura support portal, an email link to ask support to activate customer accounts on the portal, the eDocBuilder knowledgebase, and download links to the Adobe InDesign Plug-in for eDocBuilder
- **PDF Documentation** provides download links to AccuraOnline new features and technical release notes guides going back to version 6.00
- The old version tabs detailing features and changes in each release have been removed, as this information is now contained within the new PDF documentation

**New Features** documents give an overview of the major changes in each release

**Release Notes** documents provide detailed information on minor changes and bug fixes in each release

Software Release	New Features	Release Notes
Version 6.20 (latest)	Version 6.20 New Features	Version 6.20 Release Notes
Versions 6.10 to 6.11	Version 6.11 New Features	Version 6.11 Release Notes

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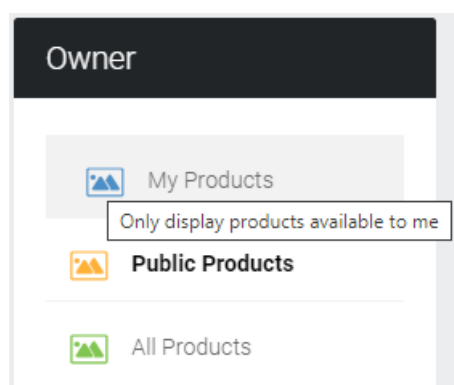
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🖱️ [www.accuramis.com](http://www.accuramis.com)

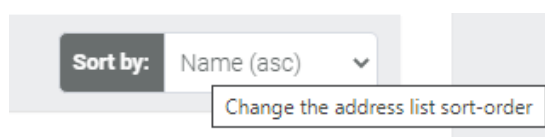
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Mouse **tooltip support** has been added to the main end-user areas changed in this release (addressing and products), providing detailed information about what each action does to enhance the usability of the website



To view the tooltips, hold the mouse cursor over the various buttons, links and options on each page. This is a work-in-progress; more tooltips will be added in each future release

More information about online help available throughout the Admin area is contained within the various *Admin Area* sections of this document



## Improved Theme Colour Customisation

This is a **preview feature** of a new header, menu and footer **widget design** to customise the **website themes** and is provided 'as is' without thorough testing for interested clients to test out. Widgets can display 8 colour fields instead of the 4 fields currently available, with much better control of how the website colours are applied and more accurate descriptions of what each colour will apply to

Header

Select Header Type

Header Style One

Header Colour One

Shown on: background colour header top

Header Colour Two

Shown on: background colour header bottom

Header Colour Three

Shown on: background colour buttons hover header top

Header Colour Four

Shown on: colour text buttons hover header top

Header Colour Five

Shown on: colour text title header bottom

Header Colour Six

Shown on: colour text info header bottom

Header Colour Seven

Shown on: background color circle of profile icon

Header Colour Eight

Shown on: replace the current colour theme in the header

This feature can be tested out by enabling **Use new theme widget colour formats** in Admin domain settings. Users that switch to the new scheme will have to set up all their colours from scratch again (including client branding), however the colour settings for the old and new widget formats are totally independently of each other so it's possible to swap and change between the two modes without any hassle or reconfiguration. Returning to the old widget behaviour will always restore the exact look and feel of the website before the changes were made

This is a domain-level setting and client branding cannot use one method whilst the domain uses another method

This feature will be fully documented and polished in a future release, however we strongly encourage interested customers to play with this feature and provide feedback on how this works with their chosen colour schemes to help us improve this feature



# Admin Area: Products

The **Admin Products area** has undergone a significant redesign to provide support for the new 'owner' filter and for the Admin user to view and control basket contents and adjust stock levels

Product	Code	Description	Artwork Template	In Baskets	Availability
	EDOC_HANG	Client office owned (DDS-Gavin). Product pricing. No quantity limits. Single price band. <b>eDoc</b> : forms designer. Prepaid		500	8000 in stock
	EDOC_POST	Client office owned (DDS-Jeff+Gavin). Product pricing. Quantity limits: 1000-2500. Pack quantity: 500. Single price band. <b>eDoc</b> : forms designer. Invoiceable		9000	Out of stock
	EDOC_BC2	Client office owned (DDS-Trevor). Product pricing. Quantity limits: 1000-Unlimited. Pack quantity: 500. Single price band. <b>eDoc</b> : forms designer. Invoiceable		0	6000 in stock

- The product list has been split into two tabs; **Products** and **Basket Items**. Previously it was impossible to view basket items. Basket items are covered in the *Admin Area: Basket Items* section of this document
- Text search and sort orders are displayed in a header area at the top of each tab. Previously, product text searches were displayed to the left of the list
- The products list view now includes the total amounts held in user baskets and the current stock level displayed in the product list for end users
- A new Artwork Templates toolbox displays for users of the eDocBuilder module, which provides new links to the eDocBuilder online help and the download page for the InDesign Plug-in
- Various tooltips have been added throughout the Admin area products pages
- A number of new actions are available for management of basket items; these will be covered in the *Admin Area: Basket Items* section of this document

**Product Details** displays a new **Stock Levels** area detailing a breakdown of stock levels and amounts in shopping baskets:

- **Accura stock level:** the stock availability level in Accura
- **Website stock level:** the numeric stock level availability on the website
- **Website availability:** the stock level availability phrase shown on the website
- **Lead time:** The product lead time when out of stock in Accura
- **In baskets (clients):** The amount of the product currently in client-account shopping baskets. These items will reduce the website stock level compared to the Accura stock level
- **In baskets (B2C accounts):** The amount of the product currently in B2C account shopping baskets. B2C accounts have created accounts on the website but have not yet placed orders which have appeared in Accura's Web Console. These items will reduce the website stock level compared to the Accura stock level
- **In baskets (B2C users):** The amount of the product currently in B2C user shopping baskets. B2C users have not yet created accounts or placed orders. These items will NOT reduce website stock levels compared to the Accura stock level

## STOCK LEVELS:

**Accura stock level:** 0  
**Website stock level:** 0  
**Website availability:** Out of stock  
**Lead time:** Not specified  
**In baskets (clients):** 6000 ⓘ  
**In baskets (B2C accounts):** 3000 ⓘ  
**In baskets (B2C users):** 0 ⓘ  
**Total in baskets:** 9000



- Tooltips against each of the 'in baskets' fields explain to what these levels mean and how they affect website stock levels
- Websites running in one of the B2B branding modes will only see the client baskets figures as the others are not relevant to B2B websites

### Product Details

Use the **Pictures** list to manage additional images for this product.

Use the **Basket Items** list to correct stock levels and/or access artwork PDFs.





Use the **template** actions to attach, change or remove an artwork template.

Online **help toolboxes** have been added to the left of the main area for help with product details and basket items if they exist for the currently displayed product

Additional links are provided for users of the eDocBuilder module to get online help for designing templates and downloading the Adobe InDesign Plug-in for eDocBuilder

A **Basket Items** list displays if there are any basket items present for that product. Basket items are covered in the following section of this document





### Artwork Templates



- Attach template 
- Design templates 
- Online help 
- Adobe InDesign Plug-in 

## Admin Area: Basket Items












The **Basket Items** tab in the Product List and **Basket Items** list in the Product Details pages allows the Admin user to control basket items for users and make corrections to stock totals displayed on the website where they don't agree with the stock levels in Accura

### Actions

- Basket reminders 
- Remove old baskets (90) 
- Remove old baskets (60) 
- Remove old baskets (30) 

 Products
  **Basket Items**

Sort by: Date (desc) ▼

Status	Date	Product Code	Description	Account Name	Account Email	Client Name	Quantity	Artwork	Remove
Active	07/10/2021	EDOC_BC1	Business Card with editable artwork	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	500		
Active	01/10/2021	FIXEDQTY	AccuraOnline leaflets	Megan Fox	megan@accuramis.com	Fit Celebrities Ltd	1	None	
Active	30/09/2021	FIXED	AccuraOnline leaflets	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	1	None	
Pending	17/09/2021	EDOC_POST	Poster with editable artwork	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	1000	None	
Pending	17/09/2021	EDOC_POST	Poster with editable artwork	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	1000	None	
Pending	17/09/2021	CLIVARIABLE	AccuraOnline leaflets	First name Last name	blah@blah.com	-	1	None	
Pending	17/09/2021	EDOC_POST	Poster with editable artwork	First name Last name	blah@blah.com	-	1000	None	
Active	16/09/2021	EDOC_POST	Poster with editable artwork	Guest Account	guest@accuramis.com	-	1000	None	
Pending	15/09/2021	EDOC_POST	Poster with editable artwork	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	1000	None	
Pending	15/09/2021	EDOC_POST	Poster with editable artwork	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	1000	None	

Page: 1 of 2
Quantity per page: 10
>
>>

### Basket Items

**Active** status items have not been ordered or synced into Accura.

**Pending** status items are in the process of being ordered; for example in draft requests, in the approval process, or waiting to be processed in Accura's Web Console.

Use the **Product Code** links to drill down to a specific product.

Use the **Account Name** links to drill down to a specific account.

Use the **Account Email** links to send emails to accounts.

Use the **Download artwork** links when you see the PDF icon in the Artwork column.

Use the **Remove** links to delete basket items. This will correct stock totals.



- Basket items with status **active** and **pending** are displayed. Active items are in shopping baskets and have not yet been ordered. Pending items have been ordered but not yet submitted into Accura, for example on draft orders, or orders in the approval stages
- Most settings (sort order, page number and number of basket items per page) are stored for the Admin user account
- Basket items for B2C users (that do not have accounts or clients) or B2C Accounts (that do not have clients) will display dashes (-) in the related columns
- An online help toolbox has been added to the left of the basket items tab which also appears in product details when there are items in baskets for the viewed product

The **Basket Items lists** allows the following actions on each basket item:



- Clicking a *Product Code* will navigate to the product details view for that product to allow the Admin user to drill down to view the basket items for that product. This column does not appear when viewing basket items from product details
- Clicking an *Account Name* will navigate to the edit account page, which allows the Admin to 'Log in as this account' to look at their shopping baskets and any requests they may have that contain these basket items
- Clicking an *Account Email* value will create a new email to that account
- If downloadable artwork exists for a basket items a PDF icon will be displayed in the *Artwork* column allowing download of the full quality artwork PDF that would appear in Accura if the item was ordered (for users with the eDocBuilder module)
- Basket items can be removed using the trash icon on the right. Active status items can be removed immediately. Pending status items will display a warning before removal because removing items from orders that have not yet been submitted could damage those orders. It is best to use the Account name link to log into accounts with pending basket items to investigate their unsubmitted requests before removing them from the basket item lists

Tooltips have been added to all links throughout the Basket Items areas

## Admin Area: Accounts

These features allow the Admin user full visibility and control of **B2C accounts** when running the website in B2C branding mode, and better control of large **B2B clients** with lots of accounts when running the website in B2B branding modes

The Admin accounts list features a new text search and sort order header at the top of the list. Previously, text searches were displayed to the left of the list and sorting was done by clicking on the column headings in the list

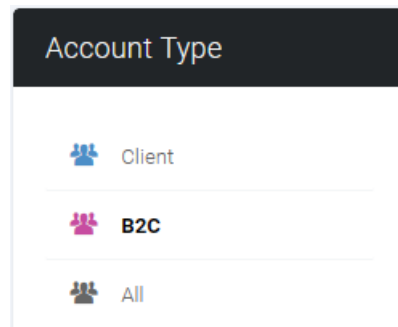
Accounts					
<input type="text" value="dds"/>		Sort by: Name (asc)			
Status	Name	Email	Client Code	Client Name	Security Profile
	Gavin Spooner	<a href="mailto:gavin@accuramis.com">gavin@accuramis.com</a>	DDS	Data Design Services Ltd	Full access to own data. Cannot approve orders or view data from other users
	Jeff Botwood	<a href="mailto:jeff@accuramis.com">jeff@accuramis.com</a>	DDS	Data Design Services Ltd	Full access



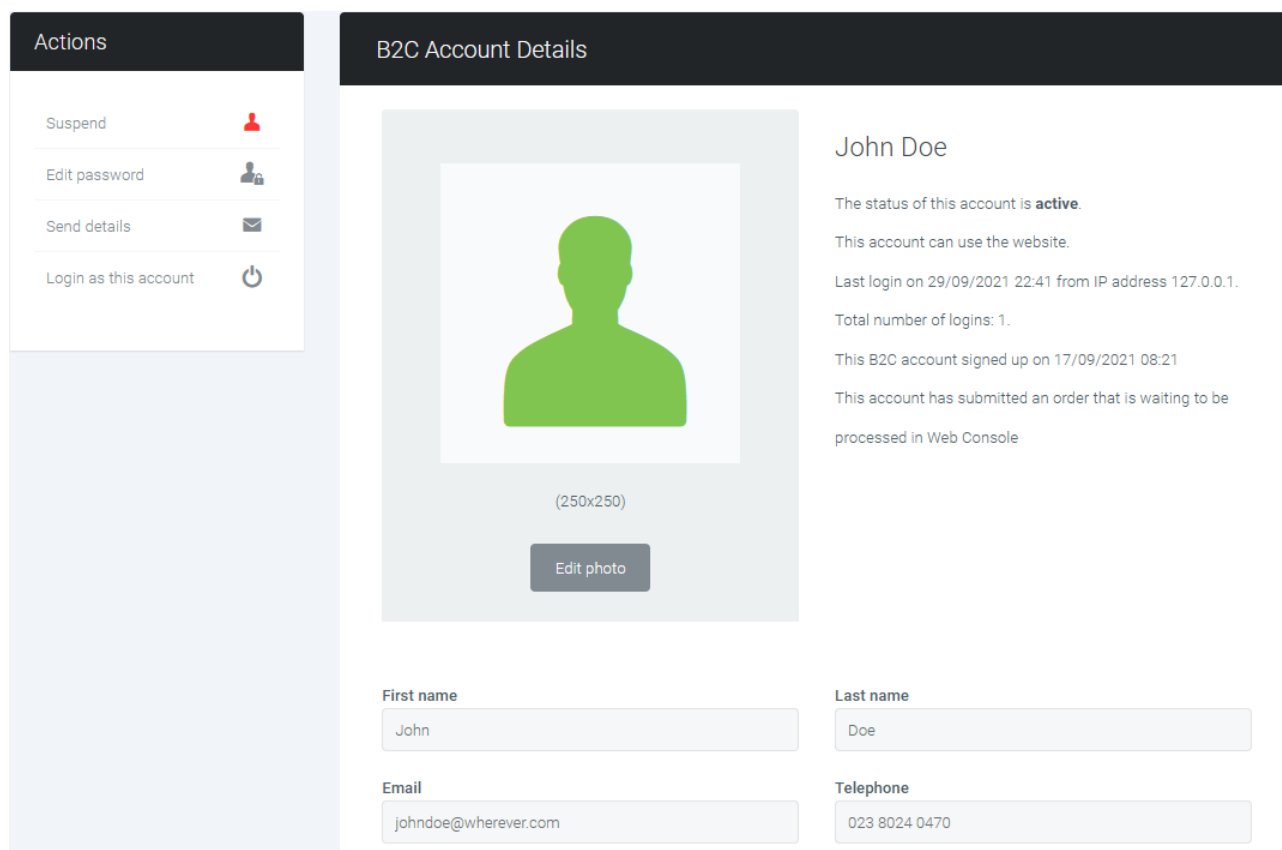
A number of new actions are available for email reminders and management of old requests; these will be covered in the *Emails, Automated Reminders & Clean-ups* section of this document

An **Account Type** filter has been added to the Admin accounts list to show client accounts, B2C accounts or both

- B2C accounts are users that have created an account during the checkout wizard but have not yet submitted an order and so will not have appeared in Web Console. As soon as a B2C account order is processed in Accura, the B2C account becomes a client account
- This filter will only display when the website is running in B2C branding mode
- This can help with troubleshooting 'account creation failed' email notifications sent from the website when trying to web-enable contacts in Accura. Go the Admin accounts list, set the 'type' filter to 'both', and then perform a text search for the offending email address



**B2C accounts can be edited** to see their sign-up details which includes their phone number. Previously it was impossible to see B2C accounts



- B2C accounts will display dashes (-) in the client code and name columns because they do not belong to clients
- B2C accounts do not have security profiles, but use a built-in (hidden) profile providing basic store access only
- B2C accounts will have 'active' status by default, unless they are manually suspended by the Admin user
- Editing B2C accounts will only provide access to the details they had to enter when they created their account, however various details such as when they signed up, their last login, number of logins and if they have submitted an order (or not) are displayed
- Available actions on B2C accounts are suspend/unsuspend, change password, send details by email and 'login as this account'



Certain types of website **accounts can be deleted** from the account edit page by using the *Delete account* action

- Deleting an account will remove the account and all associated data
- All B2C accounts can be deleted unless they have submitted an order request that has appeared in Web Console
- Suspended client accounts for clients whose web-access has been removed in Accura can also be deleted. This feature should only be used if there is no intention of reinstating web access to the account

## Actions

Delete account



Please note that manually suspending an account for a web-enabled client via the website will not allow you to delete the account

The **Client Branding Accounts tab** has also been redesigned to help manage large numbers of accounts for B2B customers

Status	Name	Email	Security Profile
Active	Gavin Spooner	gavin@accuramis.com	Full access to own data. Cannot approve orders or view data from other users
Active	Jeff Botwood	jeff@accuramis.com	Full access
Pending	Mark Aitken	mark@accuramis.com	Full access
Pending	Trevor Cocks	trevor@accuramis.com	Full access

- The text search and sort order header as used on the main Admin accounts list is now displayed at the top of the contact list. Previously, text searches were impossible, and sorting was done by clicking on the column headings in the list
- The account status filter (pending, active, suspended or all) now appears to the left of the contact list. Filtering by status was previously impossible

Tooltips have been added through the Admin accounts and Client Branding accounts lists



# Emails, Automated Reminders & Clean-ups

A number of **new email notifications** have been created and some have been updated, along with actions to trigger these emails, new **automated daily reminders** for users to complete orders, and **clean-up features to remove old data** from the database

New email: **Web2Accura: B2C account creation:**

- This email is sent to the Admin email address when a B2C account is created when they start the checkout wizard for the first time. For various reasons, these users may cancel the checkout process or navigate away from the website, leaving their account on the website and the Accura user previously had no knowledge of this
- The email contains the signup name, email address and phone number for easy contact access
- Normally this email should be quickly followed by receiving a B2C order in Web Console for the new account. If this does not happen, then you can use the new email to contact them and see why they did not order with you

Updated email: **Outstanding request approvals reminder:**

- This is an old reminder sent to approval accounts to remind them to approve orders submitted by users who lack permissions to approve their own orders. The email has been renamed from 'requests stuck at approve status' to 'outstanding request approvals reminder'
- The requests table in the email now details the type of request, and includes direct links to go to each request approval page, saving the need to navigate through the website
- The *Approval reminders* action to run this email on demand has moved from Admin settings to Admin accounts (see below)
- Automatic daily reminder emails are sent at 10am provided the email template is enabled







Updated email: **Web2Accura: Order approval account missing:**

- This is an old email sent when the *Approval reminders* is triggered, or when an individual order has been submitted for approval and the client has not been correctly configured for the approval process
- The email now contains a link to the client accounts page in the Admin area to more easily resolve the problem

New email: **Outstanding requests reminder:**

- This reminder contacts all website accounts with requests that have not yet been submitted, meaning drafts, approval rejections, and unsaved requests that were started and navigated away from. Requests awaiting approval are not included as these are already covered by the above 'outstanding request approvals reminder' email
- The email contains a table of each request, with request details, and direct links to go to the request editing page, saving the need to navigate through the website manually. Users are asked to either submit or cancel their requests
- The email can be sent on demand from the Admin account list via the *Request reminders* action (see right)
- Automatic daily reminder emails will be sent at midday provided the email template is enabled. After an upgrade, the email template will be disabled to prevent unwanted emails from being sent. It is recommended this feature is enabled only after removing old requests (see below)

## Actions

- Basket reminders 
- Approval reminders 
- Request reminders 
- Remove old requests (90) 
- Remove old requests (60) 
- Remove old requests (30) 

**Remove old requests (days) actions:**

- There are three new actions in the Admin accounts list that will delete old requests from the database. Each action details a number of days (30, 60 or 90)
- The requests must be older than the number of days selected to get removed
- These actions remove unsaved requests that were navigated away from and can safely be considered of low value. Requests saved as draft, or in the approval stages will be left alone regardless of their age, so must be dealt with by emailing the users via the 'outstanding requests reminder' email described above
- It is recommended the Admin users runs one or more of these actions to clean-up their database before they enable and start using the 'outstanding requests reminder' email



New email: **Outstanding basket items reminder:**

- This email tells users they have items in their basket (listing them in a table), and asks them to return to either complete their order or remove their items from their baskets
- This covers 'active' basket items only (meaning basket items that have not been included in a checkout request). Outstanding checkout requests are handled by the 'outstanding requests reminder' email
- The email can be sent on demand from the Admin account and product lists via the *Basket reminders* action (see right)
- Automatic daily reminder emails will be sent at 11am provided the email template is enabled. After an upgrade, the email template will be disabled to prevent unwanted emails from being sent. It is recommended this feature is enabled only after removing old basket items (see below)

**Actions**

Basket reminders

Remove old baskets (90)

Remove old baskets (60)

Remove old baskets (30)

#### Remove old baskets (days) actions:

- There are three new actions in the Admin products list to delete old basket items from the database. Each action details a number of days (30, 60 or 90)
- The basket items must be older than the number of days selected to get removed
- These actions remove 'active' status basket items that can be safely considered of low value. Basket items saved in draft requests or requests in the approval status will be left alone regardless of their age, so must be dealt with via the 'outstanding requests reminder email' described above
- It is recommended the Admin user runs one or more of these actions to clean-up their database before they enable the 'outstanding basket items reminder' email

When disabled reminder emails are manually triggered by the Admin user, a prompt will appear asking if the emails should be enabled or not. This enables both on-demand sending of the emails and the daily reminders sent at specific times

Tooltips have been added to all actions that trigger these reminder emails & related clean-up processes

## Admin Area: Security Profiles

The **Edit Security Profile** page has been reorganised, moving some permissions around and renaming others to make things more logical with the changes in this release

#### Quote Permissions

- ☒ View quotes
- ☒ Create manual quotes
- ☒ Create repeat quotes
- ☒ Create template quotes
- ☒ Reject quotes

#### Print Order Permissions

- ☒ View print orders
- ☒ Create manual orders
- ☒ Create quoted orders
- ☒ Create repeat orders
- ☒ Create template orders

#### Proof Permissions

- ☒ View proofs
- ☒ Respond to proofs

#### Store Permissions

- ☒ View products
- ☒ Use checkout
- ☒ View store orders
- ☒ View stock levels

#### Address Permissions

- ☒ Manage addresses
- ☒ View Accura offices
- ☒ View billing details
- ☒ Edit billing details
- ☒ Edit delivery addresses




#### General Permissions

- ☒ View data owned by other accounts
- ☒ Save and approve order requests
- ☒ View delivery notes
- ☒ View invoices
- ☒ View prices



- There is now an 'Addresses Permissions' category instead of 'Delivery and Invoice Permissions' which helps to focus on the security permissions applied in the new address card features
- The 'View products owned by other accounts' permission has been moved from the 'store' area to the 'address' area and renamed to 'View Accura offices', which should be a more intuitive description of what the permission does; if you can view Accura offices then it follows that you can view/filter offices owned by them, and see a list of them in the billing, delivery and my account address lists
- Detailed tooltips appear on every permission to explain in full how it affects the website, and also to explain how it relates to or may require other permissions, or which permissions you should combine it with to achieve certain results. All users are advised to take a look at these new tooltips to make sure you understand what the various permissions do
- Permissions are now validated, so if you remove a permission that prevents access to other permissions, the other permissions will be un-checked and greyed out until the required permission is reinstated. This makes it impossible to create a security profile that will trigger unexpected website behaviour

In the following example, the 'View products' permission has been denied so all of the other store permissions have been greyed out. This also shows the tooltip that appears when hovering over the 'View Accura offices' permission

 Store Permissions	 Address Permissions	 General Permissions
<input type="checkbox"/> View products	<input type="checkbox"/> Manage addresses	<input checked="" type="checkbox"/> View data owned by other accounts
<input type="checkbox"/> Use checkout	<input checked="" type="checkbox"/> View Accura offices	<input checked="" type="checkbox"/> Save and approve order requests
<input type="checkbox"/> View store orders	<div style="border: 1px solid #ccc; padding: 5px; font-size: 0.9em;">Displays Accura office addresses that do not belong to any users in checkout and my account. Also displays the locations filter in the store which filters products by delivery address</div>	
<input type="checkbox"/> View stock levels	<input type="checkbox"/> Edit delivery addresses	<input checked="" type="checkbox"/> View prices

## Admin Area: Settings & Searches

A new domain-level setting **Hide signups in B2B modes** will remove the register buttons and links in the website header, login screen and welcome banner when running the site in one of the B2B branding modes

This is aimed at large B2C customers where all sign-ups need to be done manually or via a third-party system

Branding mode

Business to business with homepage
▼

☐ Hide signups in B2B modes

Various changes have been made to **Admin and Client branding settings**:

- The Admin view settings, edit settings and client branding settings pages have been updated. Some settings have moved position to improve the layout, and some are renamed to clarify their purpose
- The view settings page now uses a two-column layout for many settings instead of the previous three columns and identifies Accura-based settings that cannot be edited via the website clearly
- Changing some settings will now show or hide related settings automatically, for example the branding mode, or disabling the slider
- The setting *Show price tax status text* is renamed to *Sales tax will be labelled as* to help clarify what the setting does: it is a way of localising your country sales tax terminology (e.g., VAT, GST and so on). This setting also displays a tooltip
- Client branding now tells you if the client is configured in Accura to include sales tax in website pricing

**Text searches** throughout the Admin area have been improved to support new fields and fix various issues. Some Admin areas that did not have text searches now feature them: news, job-types and pages. Search changes are fully documented in the release notes

