Version 5.31 New Features

Build 4 compiled on 18th January 2019

Introduction

Welcome to Accura Version 5.31 Build 3

Version 5.31 is the latest release for the Accura MIS with a simultaneous release of Accura Online 5.3x. Accura 5.31 introduces a multitude of new features and fixes to the MIS and its related applications.

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

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

About This Document

This **New Features** document details all the major features added to Accura and Accura Online since the last major public releases – Accura 5.21 and Accura Online 5.29.

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

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

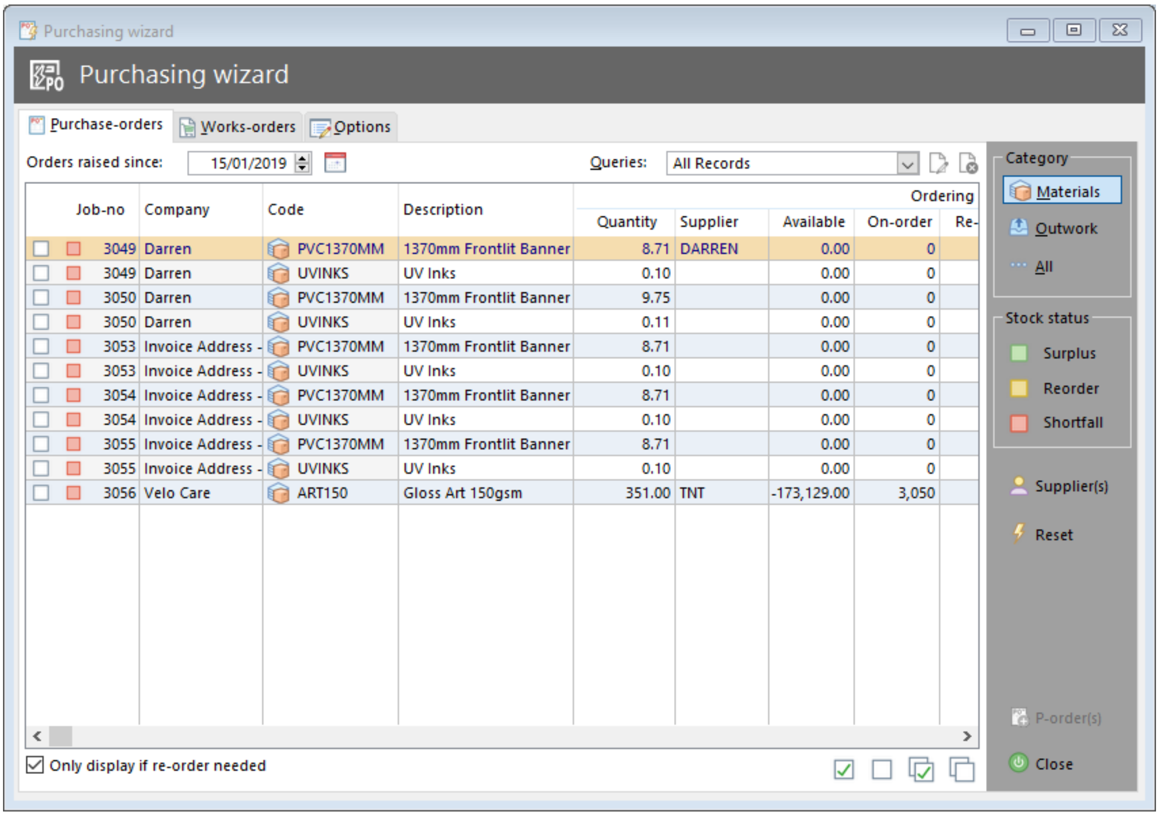
Previous versions of release notes and the technical release notes can be found in the Online Resource Area which can be accessed from the Accura Help Menu.

Contents

New Features in Accura Version 5.31 Build 4

Purchase Order Wizard

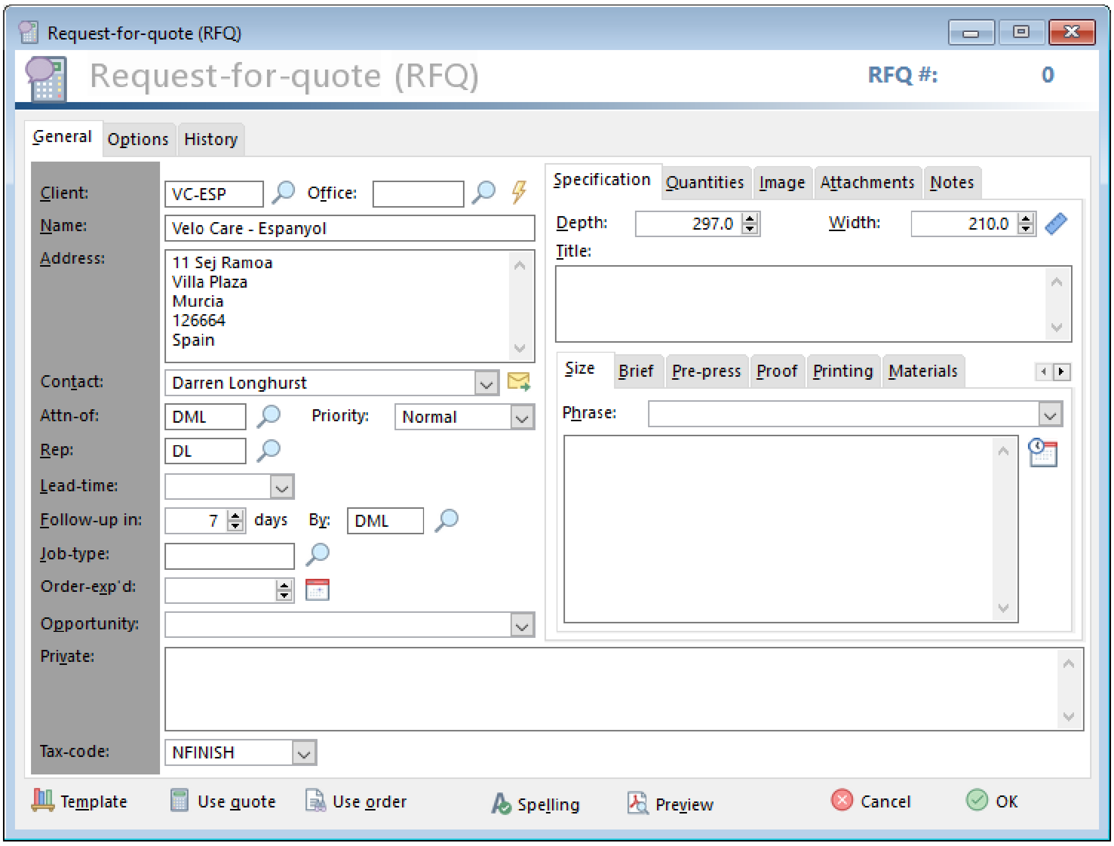
A welcome addition to 5.31 build 4 is the purchase order wizard. A new, more efficient way of raising a PO without the need to first select an order to locate your required PO items.



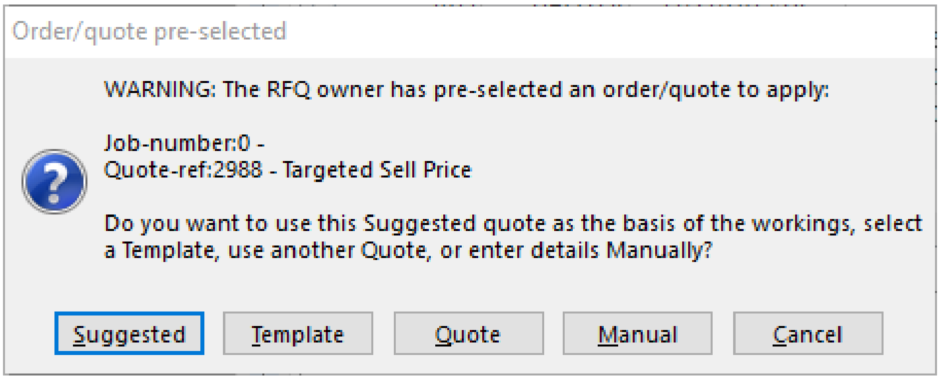
In the options tab there are the already familiar definitions available in the purchase order requisition window, now with the addition of being able to filter by supplier, category and whether your required stock has hit its re order level.

RFQ Basis Options

Request for quotes (RFQs) can now be prepopulated from existing quotes or orders. Previously it was only possible to furnish an RFQ from a quote template.



This is a powerful addition that will allow any user regardless of experience to quickly enter a vast majority of the quote information required over the phone for example before being transferred to an estimator. Once the RFQ has been submitted the estimator/rep will be notified by email and will have the option to use the previously suggested RFQ or make any additional changes as seen below.

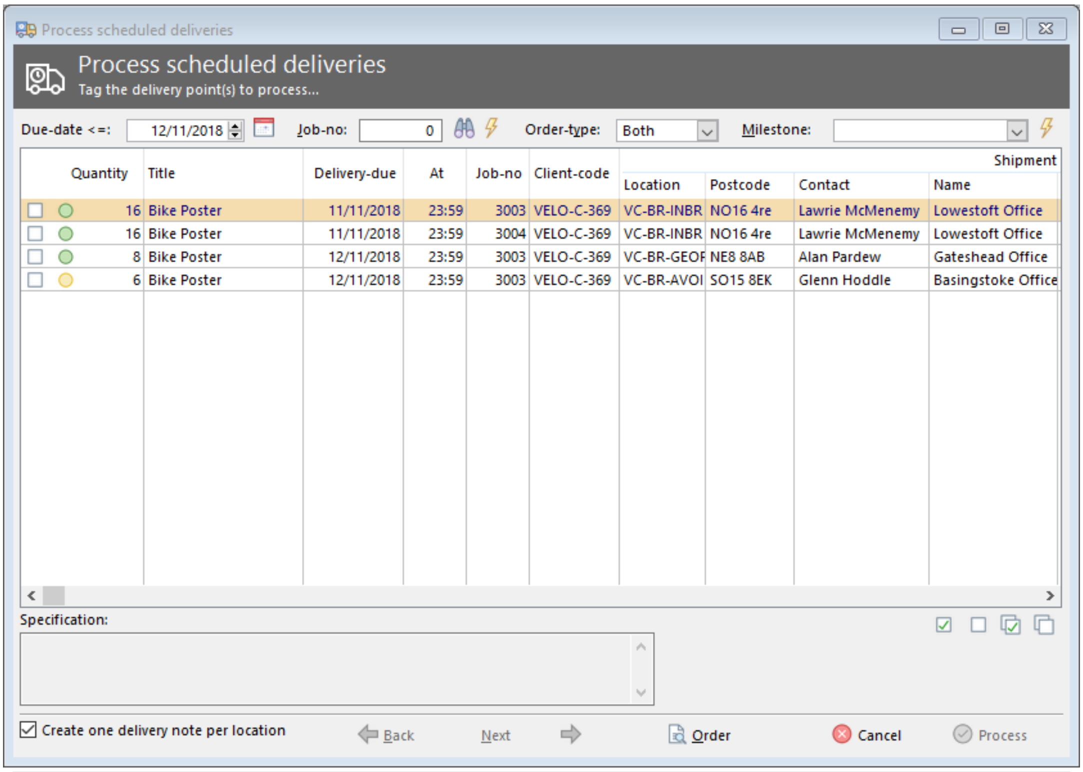


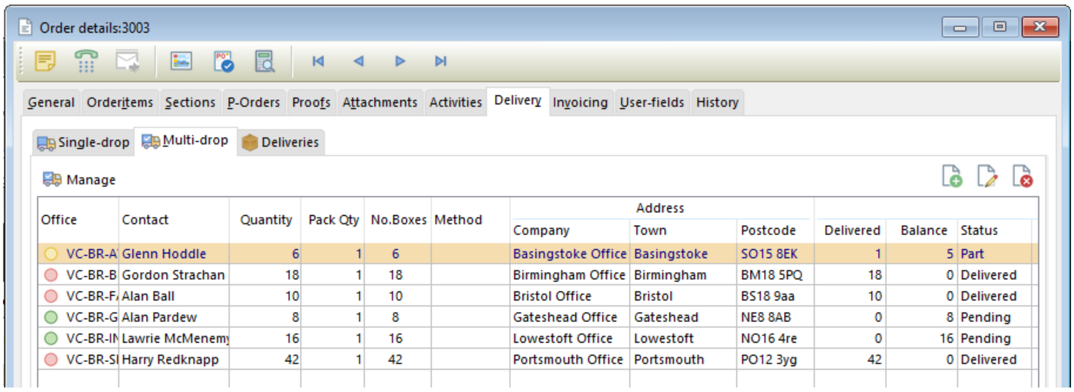
New Features in Accura Version 5.31 Build 2

Delivery Schedule

Multi drop deliveries can now be distributed in date batches. This new feature will be especially helpful for people having to follow a client specified distribution list or customers sending mailshots. Simply change the due date to the end of the working week to have deliveries due in that week appear in the window.

Delivery point status changes will simultaneously update dependant on the order quantity fulfilled when raising the delivery note. Any delivery point that has been fully delivered will no longer be shown in the delivery schedule.

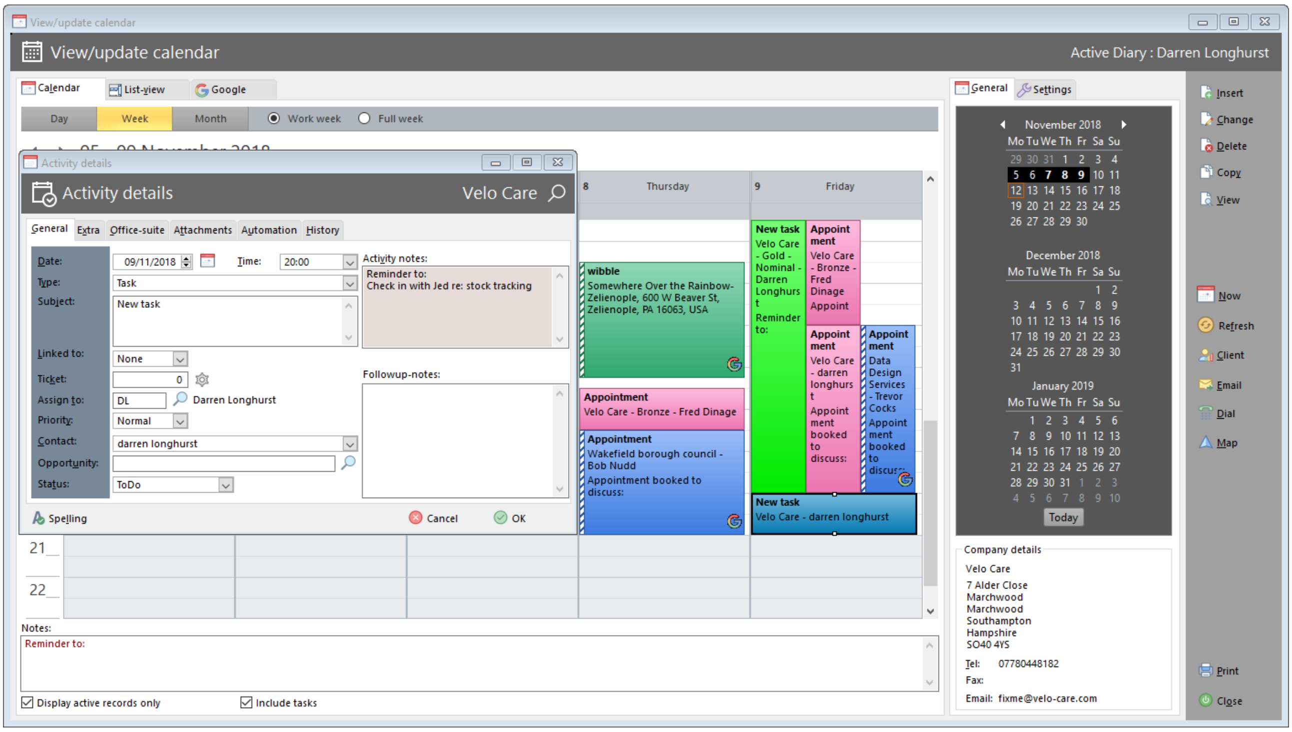




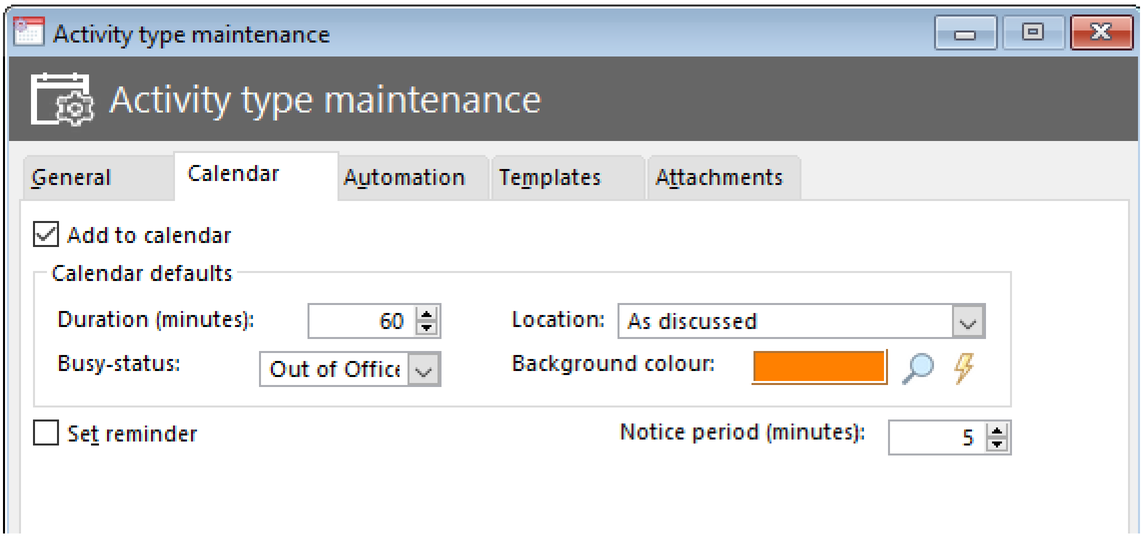
Delivery point activity and status can be viewed as before in the delivery tab of an order.
If choosing to import your delivery points, you **must** change the picture format of the ORDP:RequiredDate field. This is done by highlighting the Required Date row and clicking the **Picture** button. The picture should then be changed to **@D17**. This will allow the import to read your dates in your local windows date format.

CRM Calendar Filtering

CRM calendar now has the added functionality to show tasks as well as appointments and filter them accordingly with the addition of filtering at the bottom of the Calendar window.



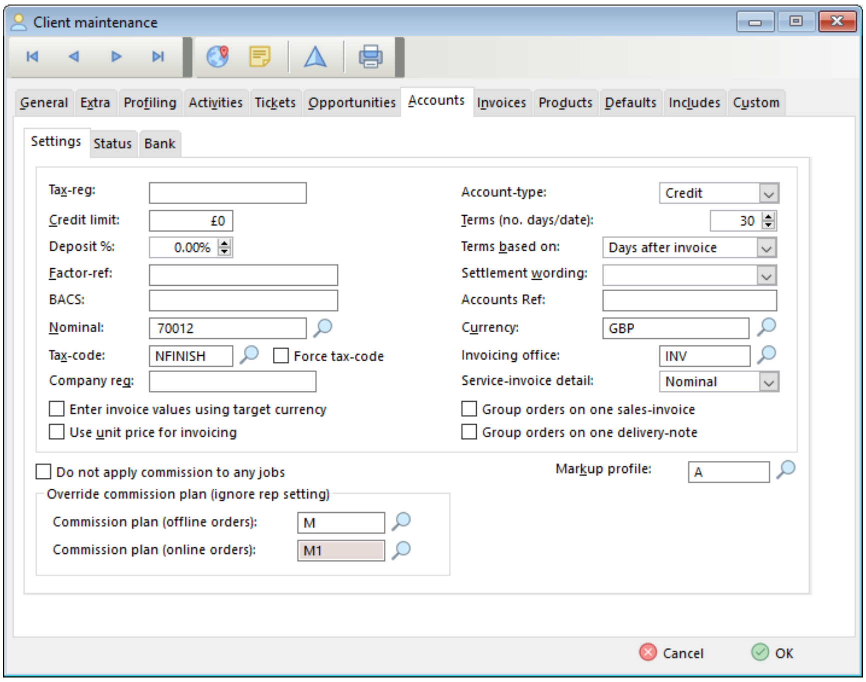
In addition to this, filtering defaults have been added to the activity type maintenance window.
The initial status of the task calendar entry can also be controlled here, "to do" tasks will appear in the calendar and as soon as the task has been marked "complete" it will no longer be shown.



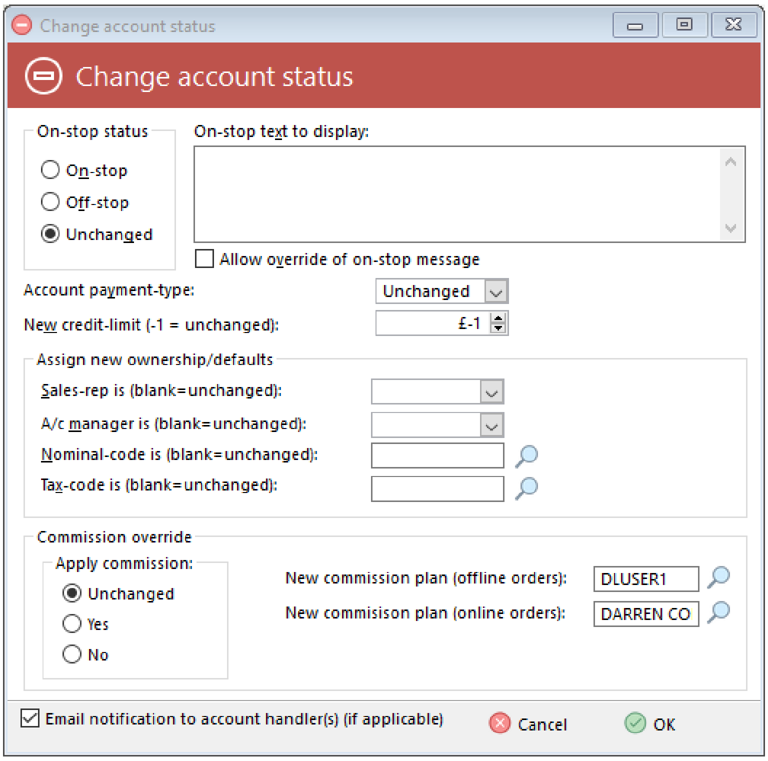
New Features in Accura Version 5.30 Build 5

Client Commissions

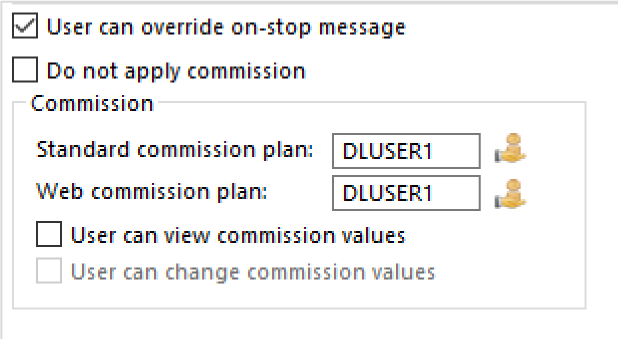
Commission plans can now be set in the client. Add a commission here and it will take precedence over both user and job type commission plans.



To complement this change in behaviour, the change account status batch update window in client browse now also includes the option to apply a commission plan to all/selected clients.

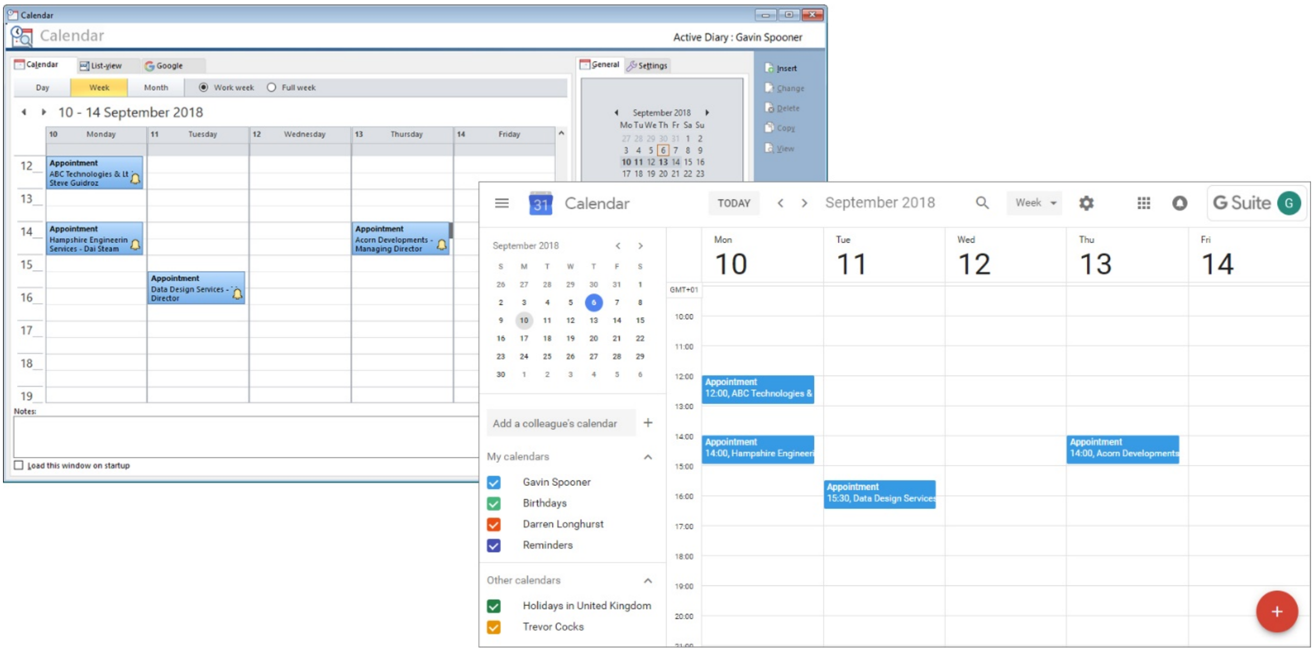


Do not apply commission flag has also been added to the user maintenance for added flexibility, allowing client set commissions to be applied to specific users where necessary.



Google Calendar Integration

Systems that have the optional **CRM module** now have the ability to link the Google's **G-Suite Calendar**. Any appointments created in CRM are instantly synced with the Google Calendar meaning members of your sales team can check their appointments while they are on the road.

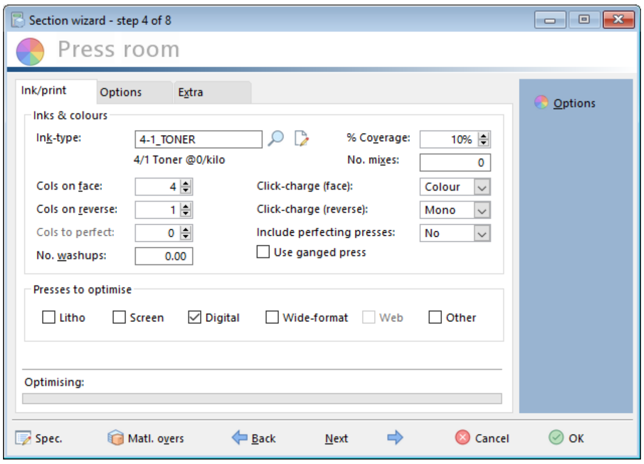


To enable this new feature, you will need both Accura CRM and a G-Suite account. You will need then also need to follow our how to guide on how to link your G-Suite account to the Google API and then Accura, please contact the support team for more information.

Watch this space for more G-Suite integration in the future!

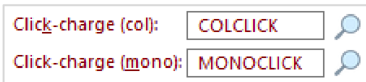
Digital Click Charges

The way digital click charges are selected within quotes has been changed to further increase the flexibility of the system, particularly when it comes to digital quotes that use a 4\1 format.

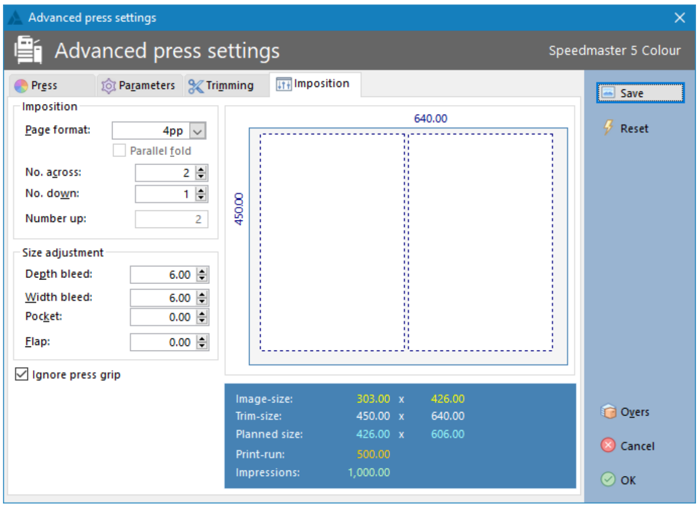


Now, it is possible to select a value for the face and reverse which will then use the digital press's associated click charges appropriately.

To support this change, ink materials also support similar fields meaning the front \ reverse click charges can be automatically set when selecting a particular ink (toner) either manually or by using the ink within a job type created specifically for this kind of work.



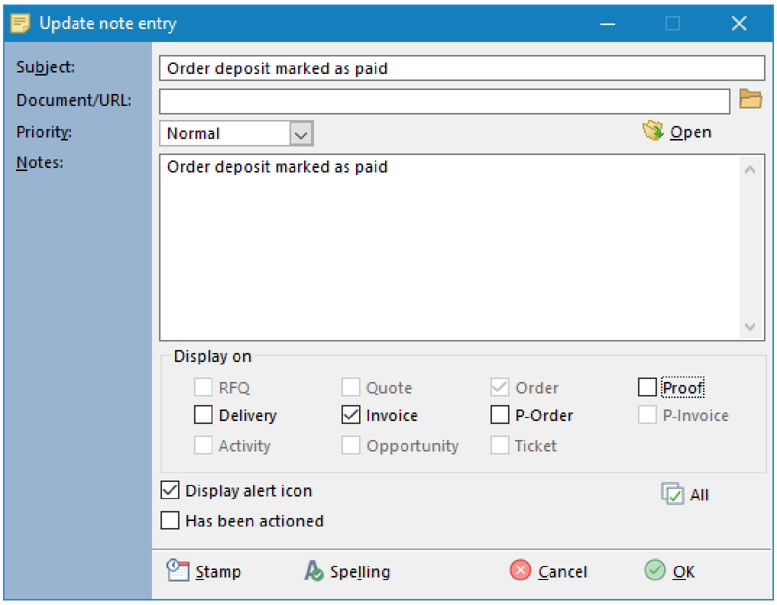
Section Imposition



A new **Imposition** window has been added to the Advanced Press Settings window in the quote section. This window differs from the Select No. in that it shows the imposition after press selection and so shows imposition on an actual sheet size rather than the raw sheet size.

Using the **Save** button will save the image to the Accura\Data\Attachments\Quotes folder on your Accura server and add an **attachment** record to the quote. This attachment will automatically be copied forward to any order raised from the quote where you would then be able to print the image alongside the job sheet.

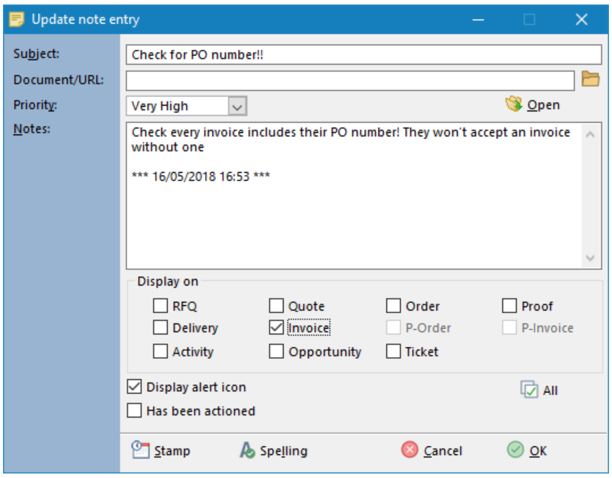
Order Contextual Notes



Order notes now support contextual notes in the same way client notes do. By default, all child records of an order, proofs, delivery notes, invoices and purchase order will display as the previous behaviour. However, a user adding an order note can specify which child records it will display for by using the check boxes in the note.

New Features in Accura Version 5.30 Build 1

Contextual Pop-up Notepad



Client and supplier pop-up notes have always been displayed whenever the client or supplier was selected into a transaction. These notes can now be contextualised to only display for certain types of transactions. For example, you may want to advise your accounts department of an issue when invoicing but this note is not applicable to other transactions for the same customer. This can be achieved by selecting the relevant checkboxes in the **Display on** section of the note entry.

EasyPost Courier Integration

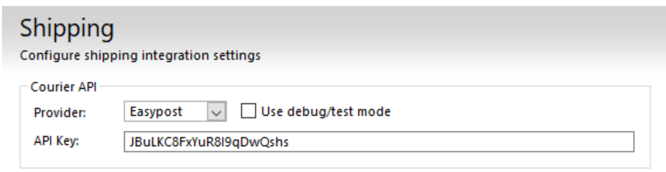
Accura 5.30 introduces a new bolt-on for the standard delivery note and shipping function – integration with EasyPost shipping API. Using this feature will allow you to be able to get accurate shipping prices from your preferred, book your desired service and print approved parcel labels, all without the need to leave your Accura or RDC. This feature eliminates the need for double-entry of information and a separate shipping terminal.

EasyPost support 100+ carriers worldwide, click [here] to see a list of all currently supported carriers. Prices start from 1¢ per package and includes consignment tracking. For US customers, address verification is also included. You can see EasyPost pricing [here].

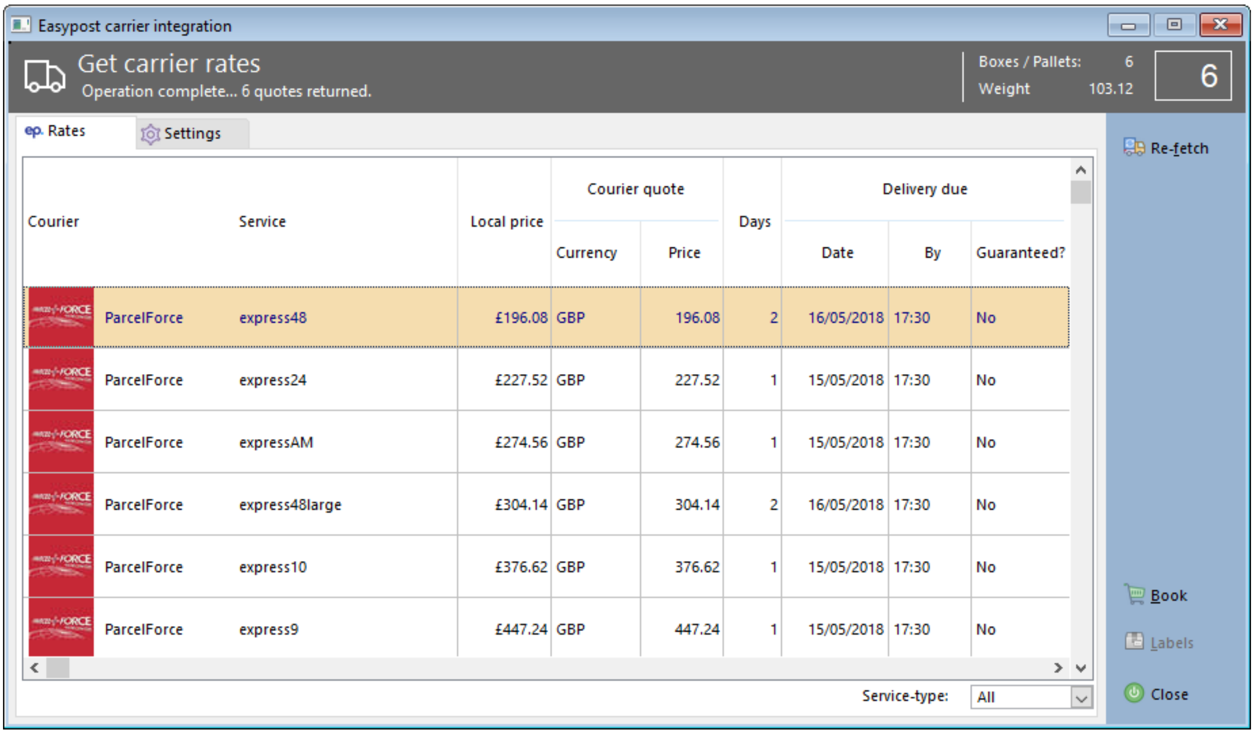
To start you will need an EasyPost account and you should sign-up at this URL –

https://www.easypost.com/signup?utm_source=AccuraMIS

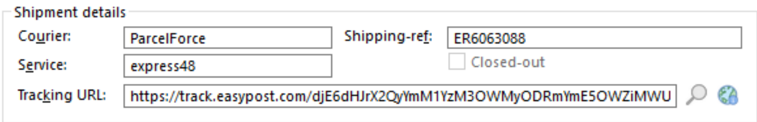
Once created, you can easily add in your preferred carriers. All you need then is to grab the API and insert in Accura's shipping defaults



Once done, you can start booking your carrier services from delivery notes. On the Carrier use the **Get-Rates** button. The API will then query your carriers for your available services and rates based on the Accura consignment weight and dimensions.



Once booked, you will be able to view and print your parcel labels. These are approved by your carrier and so there is no issue with label compatibility. Once complete, Accura stores the shipment details in the delivery note for easy reference.



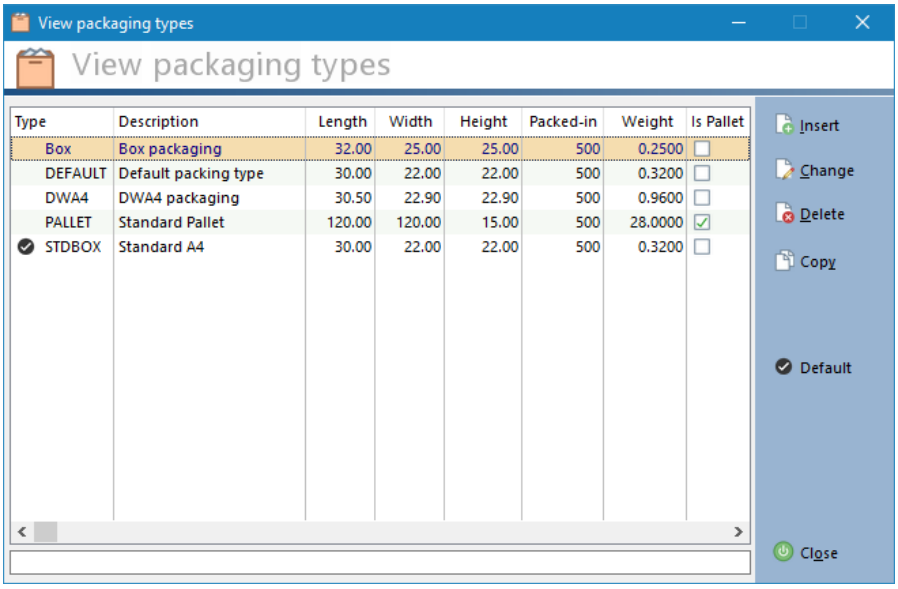
Tracking references can be included in any notification emails or SMS by using the appropriate merge tokens.

For a more in-depth guide to set-up and functionality, please watch our [EasyPost Integration video]

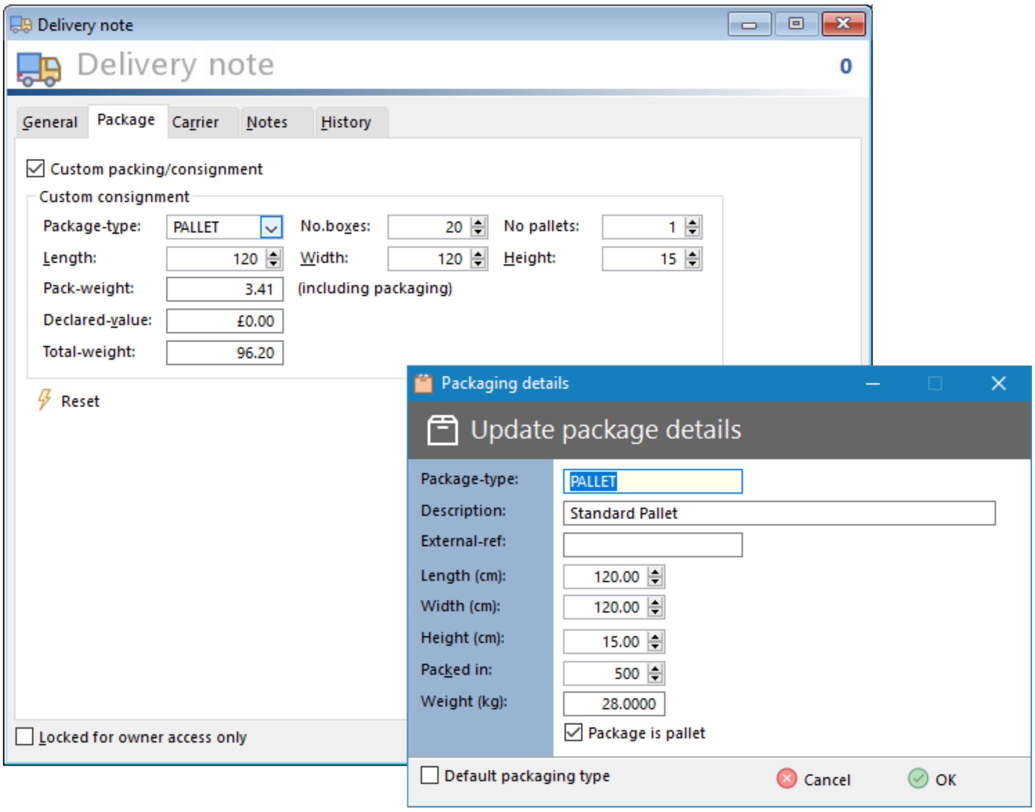
If you would like a quote for this paid-for bolt-on, please contact our [sales] department.

Packaging Settings

In previous versions of Accura, packaging types were preconfigured and entry of dimensions was always manual. This has now been overhauled and now packaging types are completely user definable along with dimensions and weight. The packaging table can be accessed via the **Setup** menu



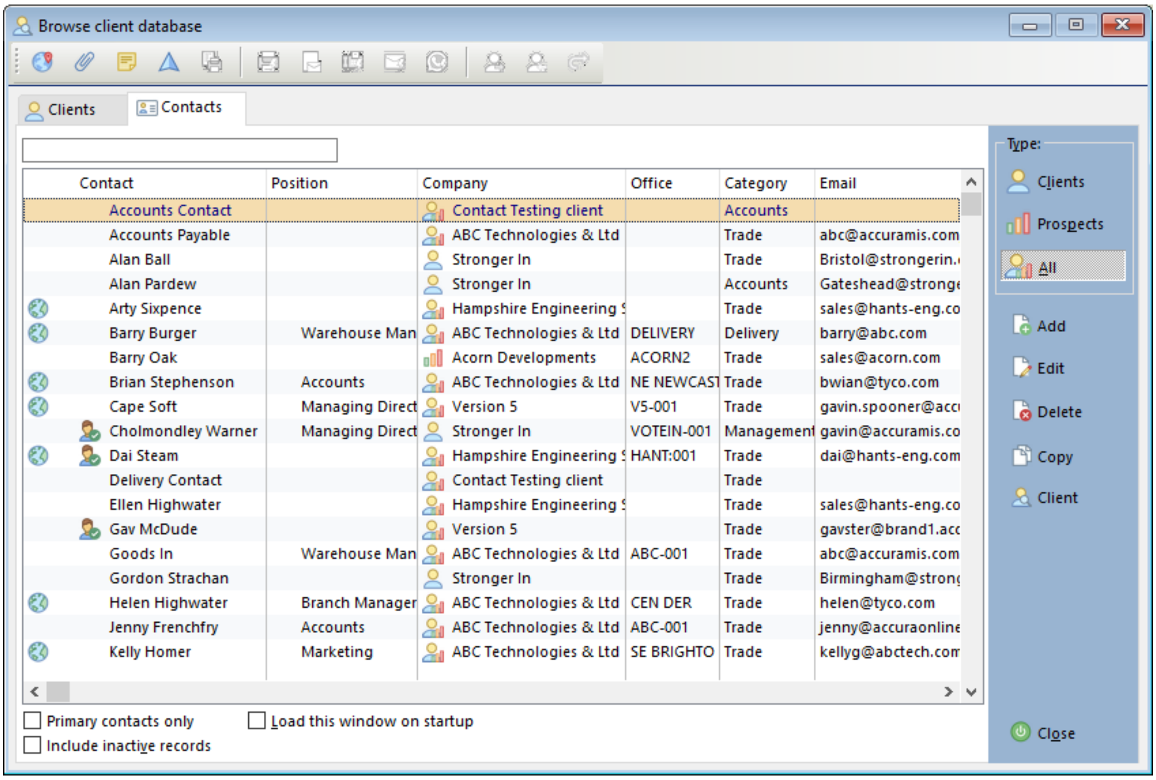
Packaging types can be used in orders, order delivery points, delivery notes and delivery note items.



When there are many items on a delivery note, it may be that the entire consignment will be shipped on a pallet or skid. For that purpose, packaging types have the option **Package is a pallet**. When this is set and the pallet package type is used in the **Custom consignment** area, the **No. Pallets** field will add the weight of the number of pallets to the total weight of the consignment. This ensures the consignment weight is accurate.

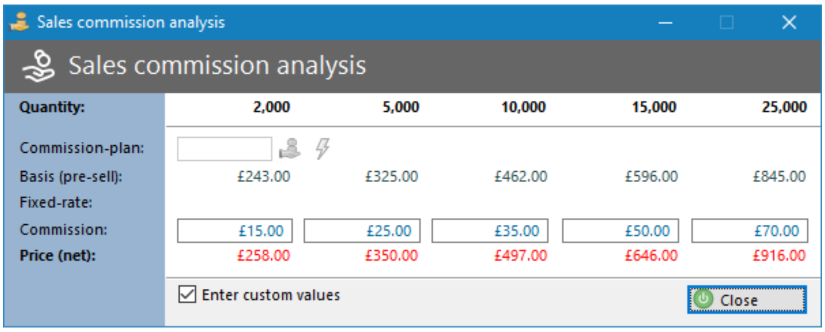
Client Browse

The Client/Prospect browse in both Accura and CRM have been redesigned to include a **Contacts** tab where all contacts are listed alphabetically and easily searchable using keyboard location. This improvement makes it a lot quicker and easier to find a client or contact when the contact name is known but the company name is not.



Ad-hoc Commission

The **commission plan** feature has been further enhanced to include **ad-hoc entry** of commission. By using this, an estimator with the appropriate permission can override a commission plan and enter a fixed rate amount across all quantities.



Commission plans are overridden by ticking the **Enter custom values** checkbox.

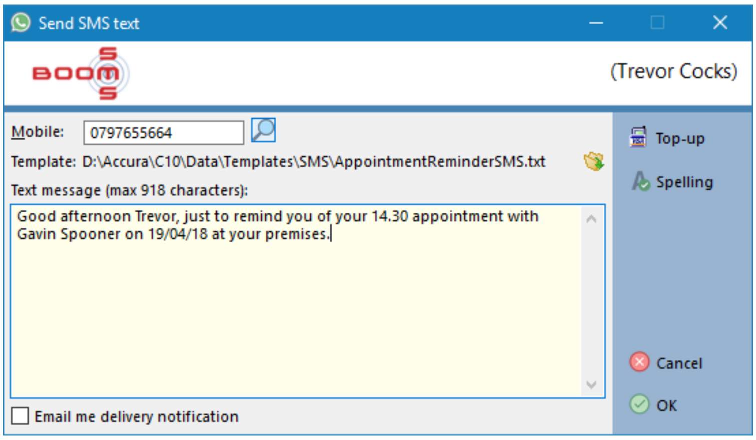
SMS Engine

The engine behind the SMS messaging has been replaced with a new, more versatile version allowing us to add some great new functionality.

In addition to the previously supported SMS providers, BoomSMS, BulkSMS and Comapi (formerly known as Dynmark), there is now the option to select two new providers, Plivo and Twilio.

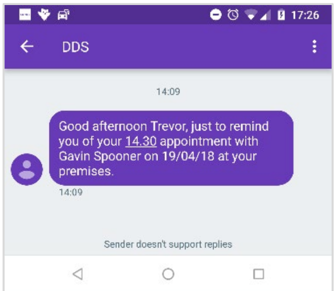
Accounts can be created on their websites, then the API and authentication details added to the SMS section of the Accura defaults.

A new feature to the SMS dialog is the ability to be able to select text templates. The templates of course support merge tokens for even quicker entry of data.



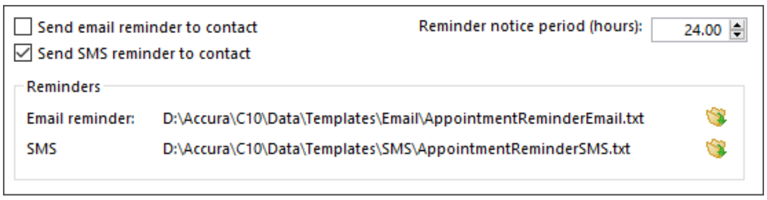
CRM SMS features

For systems with the optional **CRM** module, there is even more new functionality. The first is the ability to send an SMS broadcast. This works in principle in the same was as an email broadcast with the added benefit of going directly to your customer's phones. Using this fantastic marketing tool, you can instantly inform clients of your latest news and offers.



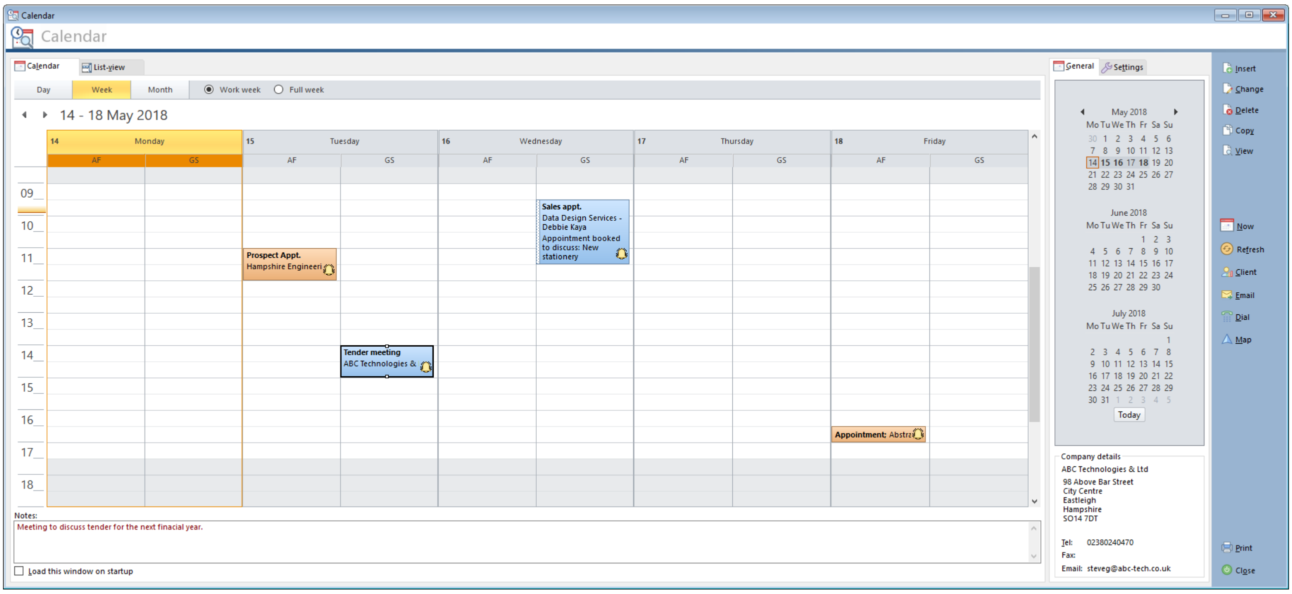
It's also possible now to set up SMS reminders for Appointments and other CRM activity types. This way you can gently remind your contacts of upcoming appointments.

This feature can be switched on in the **Templates** tab of your appointment activity type where you should also select a default SMS reminder template. The reminder SMS will then be sent out in the background at the notice period you've set.

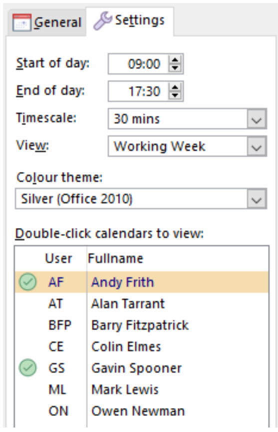


CRM Calendar

Accura CRM's Calendar has been given a major overhaul both cosmetically and functionally. The Calendar has been redesigned to give a more familiar Outlook feel and there are many different MS Office based themes to choose from to customise the Calendar to your own preference.



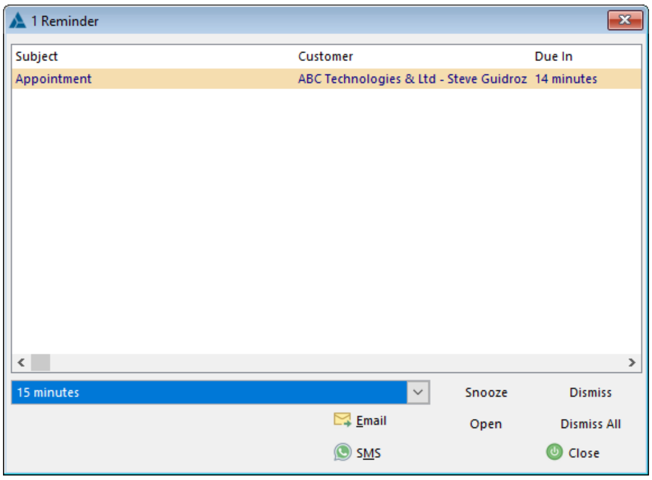
It is now easier to see other user's Calendar dates by selecting the calendars you need to view. You can see many user's calendars side by side or just your own.



On the **Settings** tab in the calendar, you will see a list of users; your own calendar is displayed by default. By simply double clicking on another user, you will then be able to see their diary side-by-side with your own or you can turn your own off. If you would rather users did not have the ability to see other's diaries, you can restrict their access from the CRM tab in their user profile, **User can manage other calendars**. Users can also be omitted from the user list by unticking **Enable appointment calendar**.

On the Settings tab you can also configure the time frame and view as well as choose from the many different themes available,

Each user can have their own appointment colour for ease of use. This is configured within the user's user profile on the CRM tab.



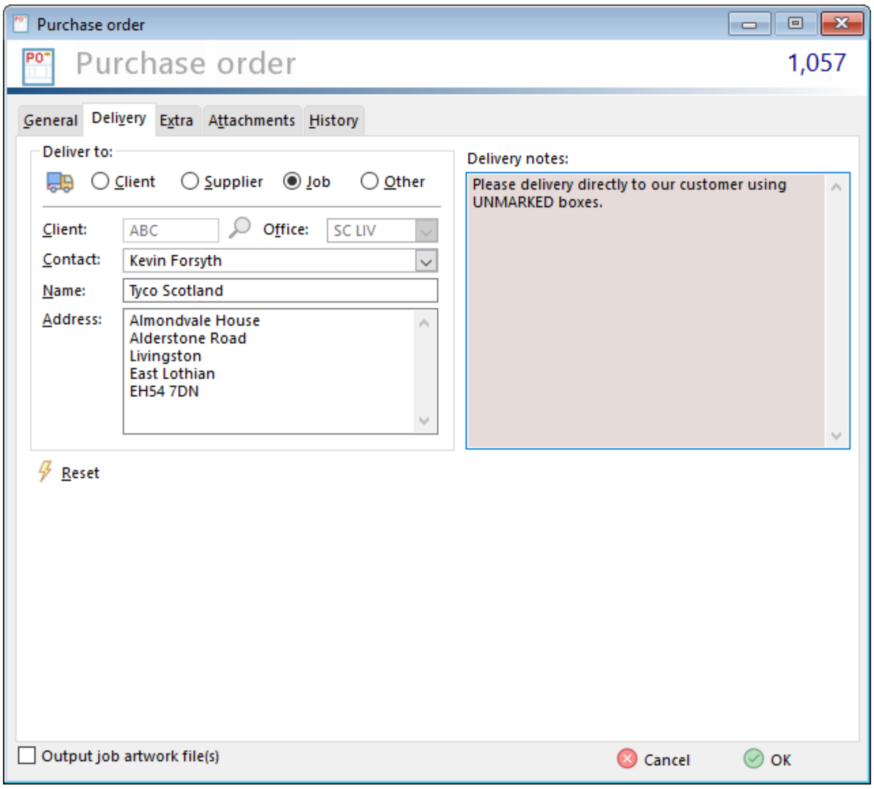
If you do not have your Calendar open, Accura CRM will now display a **Reminder** window to remind you of your upcoming appointments.

The reminder window has all the functionality you would expect such as Snooze and Dismiss but there are also the options to be able to Email or SMS your contact to remind them of the appointment.

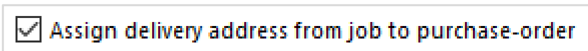
Please also see SMS reminders

Purchase Order Delivery Option

There may be instances when you need a supplier to deliver directly to your customer. There is a new purchase order delivery option called **Job** where the deliver-to address of the purchase order will automatically be set to that of the order's delivery client, contact and address.



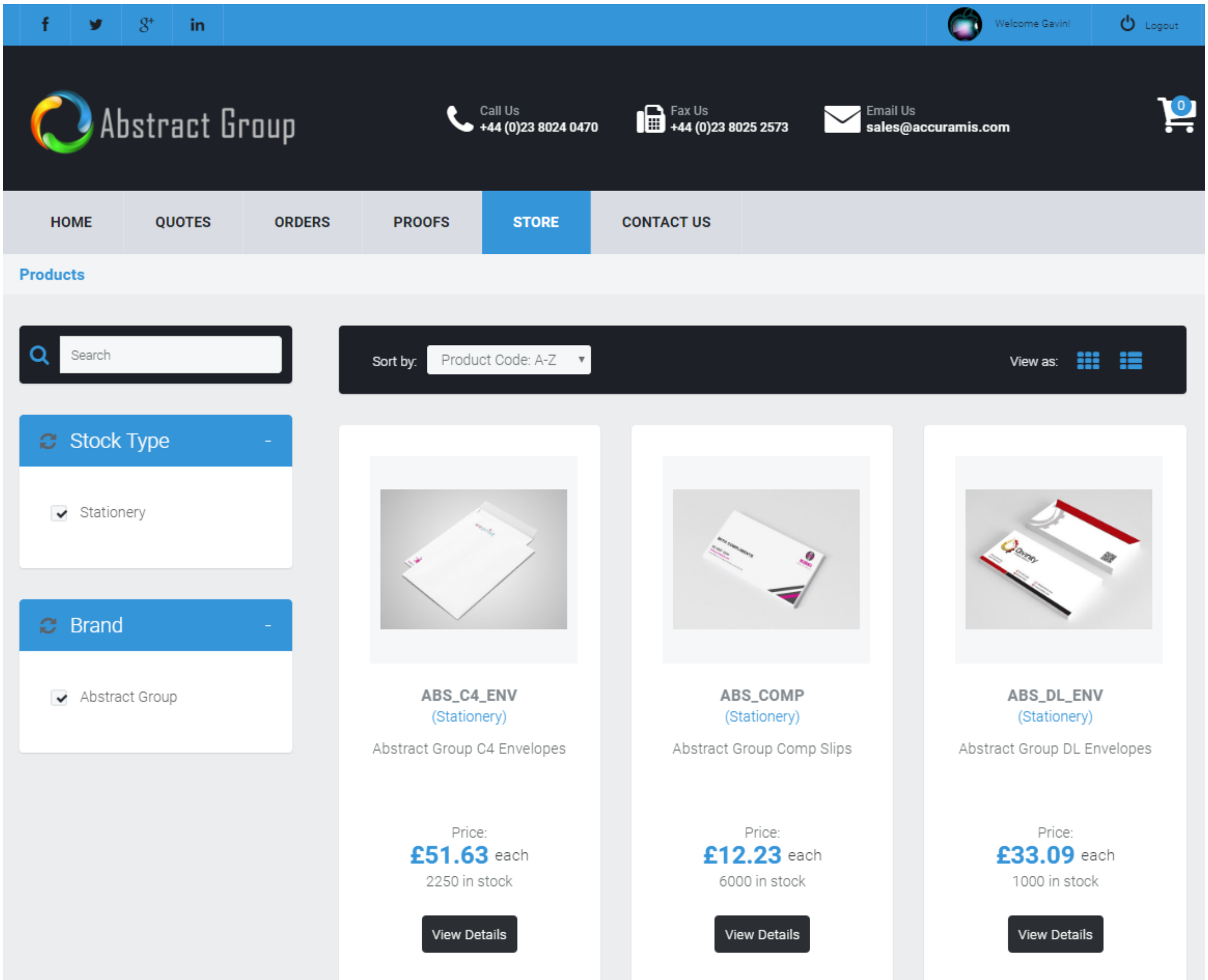
To determine whether a purchase order should use the job delivery address is a **per supplier** setting. This can be switched on or off for each supplier in the Extra tab of supplier maintenance.



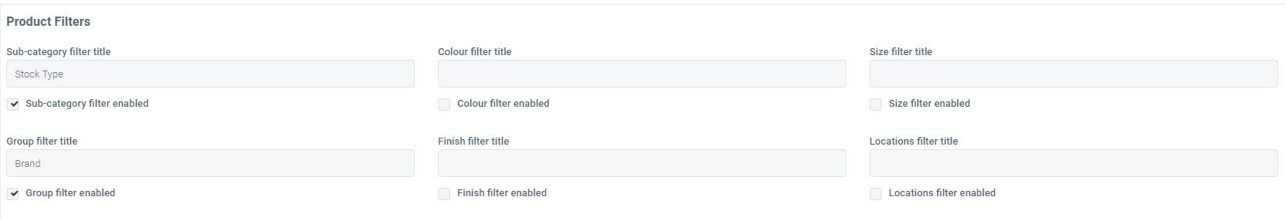
New Features in AccuraOnline 5.30

Advanced Filter Settings

Filters throughout Accura Online have been completely redesigned to improve both functionality and performance.



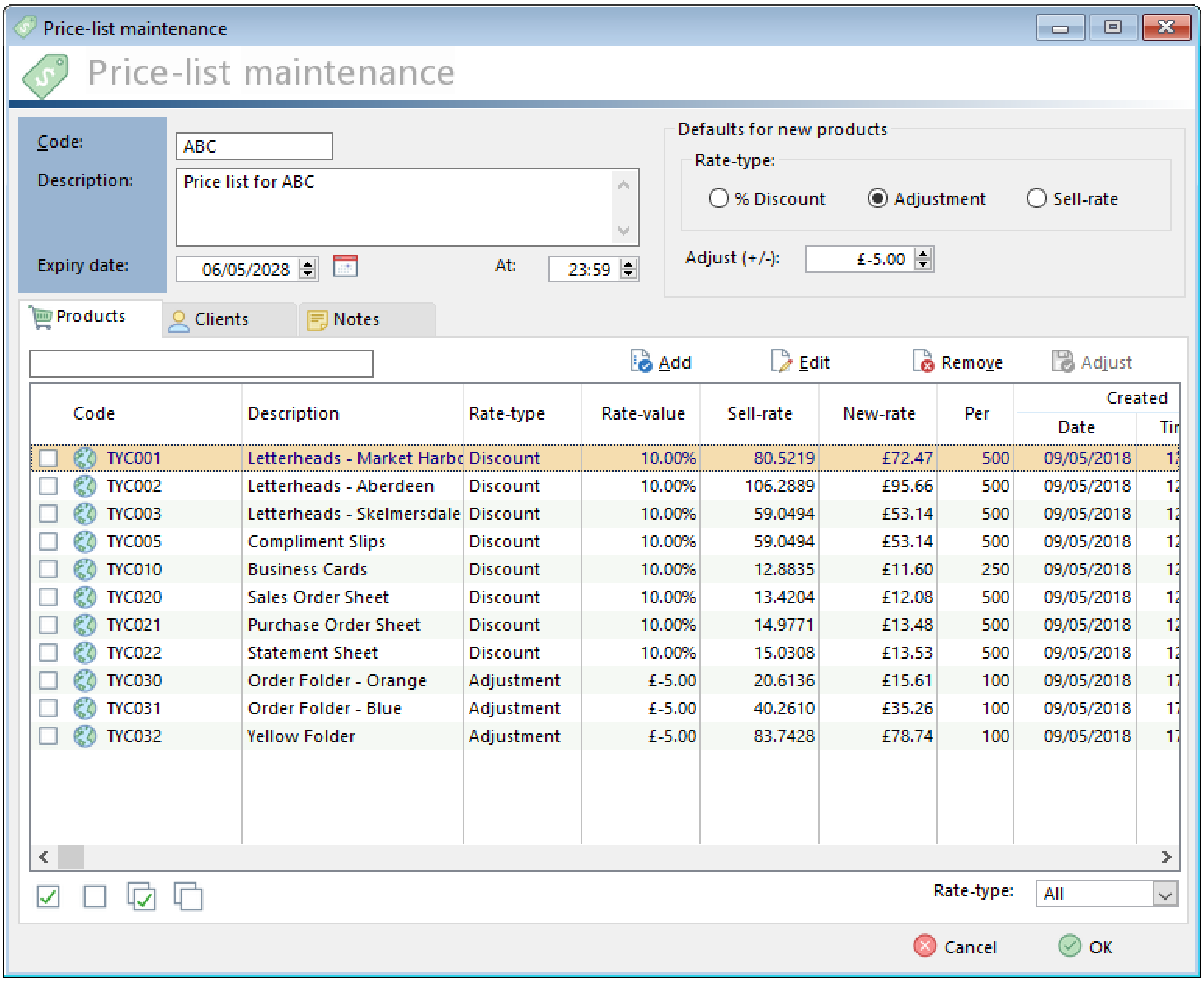
The filters can be displayed, hidden and renamed at domain or client level, contracted and expanded, and are context sensitive. This means that 'dynamic' filters throughout the website remove all filter entries no longer valid to the data being displayed.



Product 'finish' values now appear as a new optional filter in the Store. Filter display and renaming options can be found under in the main Settings page in the Admin area or within client branding.

Client-Specific Product Pricing

Online store product pricing is now fully customisable per client allowing up to 10 price breaks and a thereafter for each product. Price-lists are set up from within Accura via the Stock – Price-lists menu.



Rates can be set as a percentage **Discount** of the base sell rate, a fixed rate **Adjustment** of the base sell rate or a fixed **Sell rate**. Each product can in turn be edited to set a pricing matrix of up to 10 price breaks and a thereafter rate.

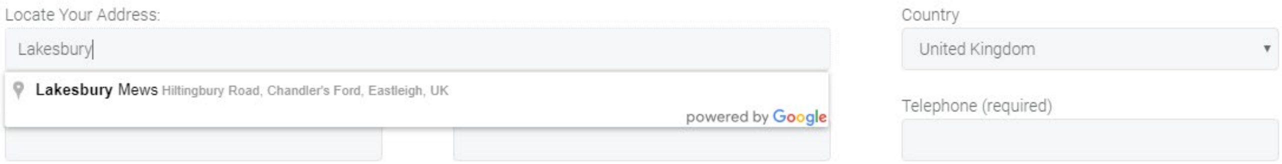
The product min order quantity, max order quantity, and quantity choices values can also be customised per client in price-lists. Client-specific pricing also supports an expiry date and time.

Multiple clients can belong to a single pricelist but a client can only belong to one price list. If a client is selected into a second pricelist, this will override the original selection. In addition to the Clients tab of the price list maintenance browse, you can view and select a pricelist from the Products tab in client maintenance.

It should be noted that if client-specific pricing exists on template-linked products, the products will behave as if they are no longer template-linked, for example they will no longer allow live price calculation.

Google Integration

The Sign-up registration form allows automatic population of address details via Google.



- The Google map displayed on 'Contact Us' page now requires Google integration.
- Support for Google Analytics website tracking added at domain and client branding level.

Google integration can be configured in Accura via the Setup – System menu, and via the website Admin area 'Settings\Google' tab.

In order to use the Google Map and Analytics, you will need a Google account to be able to sign up for an integration API key. An API key is a unique code that allows one computer system to talk to another and call on specific functions.

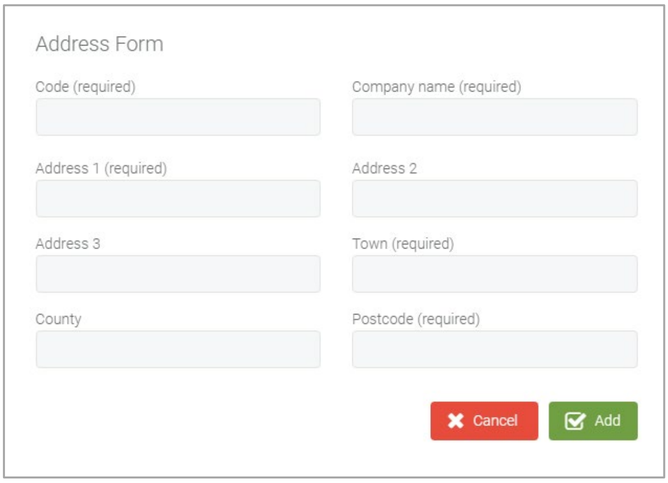
When you have a Google account, you will need to sign-up for a Maps API key which you can do here. Once done you will be given an API key which looks similar to this format - *AIzaSyXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX* . This key should then either be entered into Accura through the Setup - System settings or in Accura Online's Settings page.

For the Google Analytics, you should sign-up here. After completing the new account sign-up, you will be given a Tracking ID will be in a format similar to this - *UA-000000-0*. This should then be entered in your Accura Online in the main Settings page or in Client Branding for client specific tracking. You can set up multiple tracking accounts (up to 100) in your Goggle Analytics account so you can track each of your domains and/or clients.

Some of the above steps can seem very technical. If in any doubt you should consult your IT provider for assistance.

Address Management & Permissions

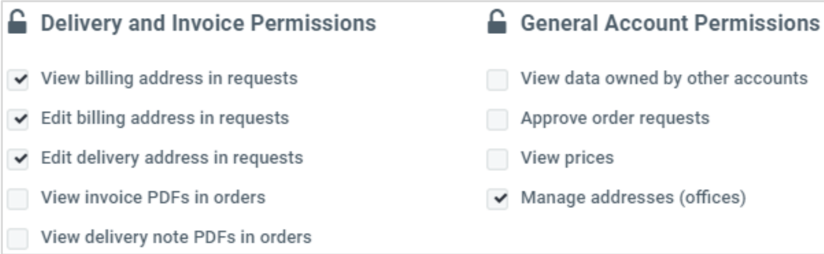
New addresses (e.g. Accura sub-offices) can be created and edited in the 'My Account' area and will sync back to Accura.



Custom delivery address and contact information in orders is now entered via a pop-up address form.

Full control over the visibility and editing of billing and delivery details in quote and order requests and checkout.

The Security profile page in Admin area has been re-designed to group permissions into logical groups.



The new permissions work as follows:

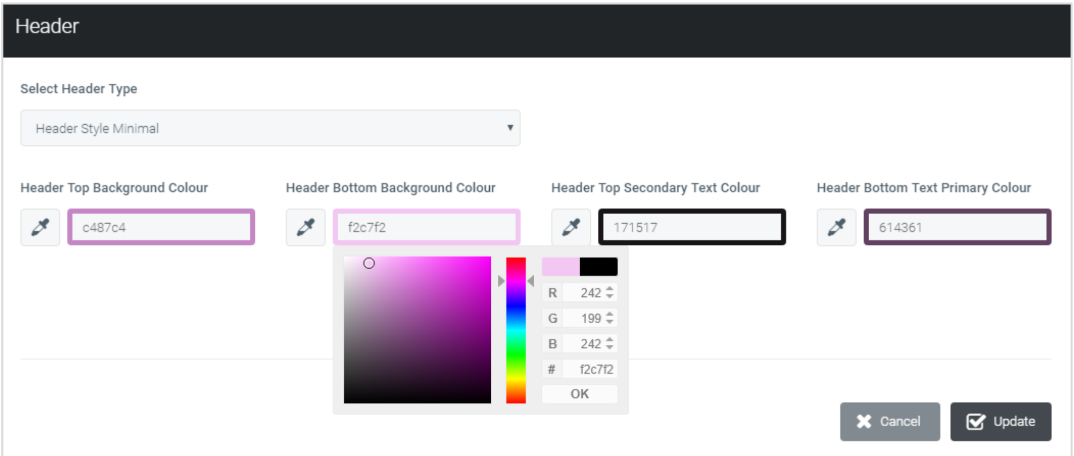
'Manage addresses (offices)' controls the ability for accounts to manage addresses in the 'My Account' area.
'View billing address in requests' shows or hides the billing contact and address on quotes and orders.

'Edit billing address in requests' allows editing of billing contact and address on quotes and orders. When the billing address can be viewed but not edited, it is displayed as read-only.

'Edit delivery address in requests' permission allows editing of delivery contact and address on quotes and orders. Delivery details cannot be hidden, but if they are not editable they default to the current account and still allow 'Custom' delivery details to be entered.

Enhanced Colour Customisation

Widgets in the Admin area now feature full configuration of background and text colouring to improve website customisation and client branding.



Pop-up colour pickers (as an alternative to the RGB# colour picker shown above) have been added to the Theme, Slide and Widget colour configuration options in the Admin area.

These display the site logo image, or (on slides) the current slide image, and allow you to hover over the image to sample a colour from it.

This makes website customisation and client branding much easier to manage.