



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.



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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.

The screenshot shows the 'Purchasing wizard' window. It has a title bar with standard window controls. Below the title bar is a tabbed interface with 'Purchase-orders', 'Works-orders', and 'Options'. The 'Purchase-orders' tab is active. It features a search bar for 'Orders raised since' with a date picker set to '15/01/2019' and a 'Queries' dropdown set to 'All Records'. The main area is a table with columns: Job-no, Company, Code, Description, Quantity, Supplier, Available, On-order, and Re-order. The table contains 12 rows of data. To the right of the table is a sidebar with filters: 'Category' (Materials, Outwork, All), 'Stock status' (Surplus, Reorder, Shortfall), 'Supplier(s)', 'Reset', 'P-order(s)', and 'Close'. At the bottom of the window, there is a checkbox 'Only display if re-order needed' and a row of icons for filtering and actions.

| Job-no | Company | Code | Description | Quantity | Supplier | Available | On-order | Re-order |
|--------------------------|---------|-------------------|-------------|------------------------|----------|-----------|-------------|----------|
| <input type="checkbox"/> | 3049 | Darren | PVC1370MM | 1370mm Frontlit Banner | 8.71 | DARREN | 0.00 | 0 |
| <input type="checkbox"/> | 3049 | Darren | UVINKS | UV Inks | 0.10 | | 0.00 | 0 |
| <input type="checkbox"/> | 3050 | Darren | PVC1370MM | 1370mm Frontlit Banner | 9.75 | | 0.00 | 0 |
| <input type="checkbox"/> | 3050 | Darren | UVINKS | UV Inks | 0.11 | | 0.00 | 0 |
| <input type="checkbox"/> | 3053 | Invoice Address - | PVC1370MM | 1370mm Frontlit Banner | 8.71 | | 0.00 | 0 |
| <input type="checkbox"/> | 3053 | Invoice Address - | UVINKS | UV Inks | 0.10 | | 0.00 | 0 |
| <input type="checkbox"/> | 3054 | Invoice Address - | PVC1370MM | 1370mm Frontlit Banner | 8.71 | | 0.00 | 0 |
| <input type="checkbox"/> | 3054 | Invoice Address - | UVINKS | UV Inks | 0.10 | | 0.00 | 0 |
| <input type="checkbox"/> | 3055 | Invoice Address - | PVC1370MM | 1370mm Frontlit Banner | 8.71 | | 0.00 | 0 |
| <input type="checkbox"/> | 3055 | Invoice Address - | UVINKS | UV Inks | 0.10 | | 0.00 | 0 |
| <input type="checkbox"/> | 3056 | Velo Care | ART150 | Gloss Art 150gsm | 351.00 | TNT | -173,129.00 | 3,050 |

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.

The screenshot shows a software window titled "Request-for-quote (RFQ)" with a sub-header "Request-for-quote (RFQ)" and "RFQ #: 0". The window has three tabs: "General", "Options", and "History". The "General" tab is active, showing fields for Client (VC-ESP), Name (Velo Care - Espanyol), Address (11 Sej Ramoa, Villa Plaza, Murcia, 126664, Spain), Contact (Darren Longhurst), Attn-of (DML), Priority (Normal), Rep (DL), Lead-time (7 days), Follow-up in (7 days), By (DML), Job-type, Order-exp'd, Opportunity, Private, and Tax-code (NFINISH). On the right, there are tabs for Specification, Quantities, Image, Attachments, and Notes. The "Specification" tab is active, showing Depth (297.0), Width (210.0), Title, and a large text area for the description. At the bottom, there are buttons for Template, Use quote, Use order, Spelling, Preview, Cancel, and OK.

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.

The screenshot shows a dialog box titled "Order/quote pre-selected". It contains a warning message: "WARNING: The RFQ owner has pre-selected an order/quote to apply:". Below this, it lists "Job-number:0 -" and "Quote-ref:2988 - Targeted Sell Price". A question mark icon is next to the text: "Do you want to use this Suggested quote as the basis of the workings, select a Template, use another Quote, or enter details Manually?". At the bottom, there are five buttons: Suggested, Template, Quote, Manual, and Cancel. The "Suggested" button is highlighted with a blue border.



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.

The image shows two screenshots from the Accura software interface. The top screenshot is the 'Process scheduled deliveries' window, which allows users to tag delivery points for processing. It includes a table with columns for Quantity, Title, Delivery-due, At, Job-no, Client-code, Location, Postcode, Contact, and Name. The bottom screenshot is the 'Order details:3003' window, showing a tabbed interface with 'Deliveries' selected. It displays a table with columns for Office, Contact, Quantity, Pack Qty, No.Boxes, Method, Company, Town, Postcode, Delivered, Balance, and Status.

Process scheduled deliveries

Tag the delivery point(s) to process...

Due-date <=: 12/11/2018 Job-no: 0 Order-type: Both Milestone:

| Quantity | Title | Delivery-due | At | Job-no | Client-code | Location | Postcode | Contact | Name |
|----------|-------------|--------------|-------|--------|-------------|------------|----------|-----------------|--------------------|
| 16 | Bike Poster | 11/11/2018 | 23:59 | 3003 | VELO-C-369 | VC-BR-INBR | NO16 4re | Lawrie McMenemy | Lowestoft Office |
| 16 | Bike Poster | 11/11/2018 | 23:59 | 3004 | VELO-C-369 | VC-BR-INBR | NO16 4re | Lawrie McMenemy | Lowestoft Office |
| 8 | Bike Poster | 12/11/2018 | 23:59 | 3003 | VELO-C-369 | VC-BR-GEOF | NE8 8AB | Alan Pardew | Gateshead Office |
| 6 | Bike Poster | 12/11/2018 | 23:59 | 3003 | VELO-C-369 | VC-BR-AVOI | SO15 8EK | Glenn Hoddle | Basingstoke Office |

Order details:3003

General OrderItems Sections P-Orders Proofs Attachments Activities Delivery Invoicing User-fields History

Single-drop Multi-drop Deliveries

Manage

| Office | Contact | Quantity | Pack Qty | No.Boxes | Method | Company | Town | Postcode | Delivered | Balance | Status |
|----------|-----------------|----------|----------|----------|--------|--------------------|-------------|----------|-----------|---------|-----------|
| VC-BR-A | Glenn Hoddle | 6 | 1 | 6 | | Basingstoke Office | Basingstoke | SO15 8EK | 1 | 5 | Part |
| VC-BR-B | Gordon Strachan | 18 | 1 | 18 | | Birmingham Office | Birmingham | BM18 5PQ | 18 | 0 | Delivered |
| VC-BR-F | Alan Ball | 10 | 1 | 10 | | Bristol Office | Bristol | BS18 9aa | 10 | 0 | Delivered |
| VC-BR-G | Alan Pardew | 8 | 1 | 8 | | Gateshead Office | Gateshead | NE8 8AB | 0 | 8 | Pending |
| VC-BR-IN | Lawrie McMenemy | 16 | 1 | 16 | | Lowestoft Office | Lowestoft | NO16 4re | 0 | 16 | Pending |
| VC-BR-SI | Harry Redknapp | 42 | 1 | 42 | | Portsmouth Office | Portsmouth | PO12 3yg | 42 | 0 | Delivered |

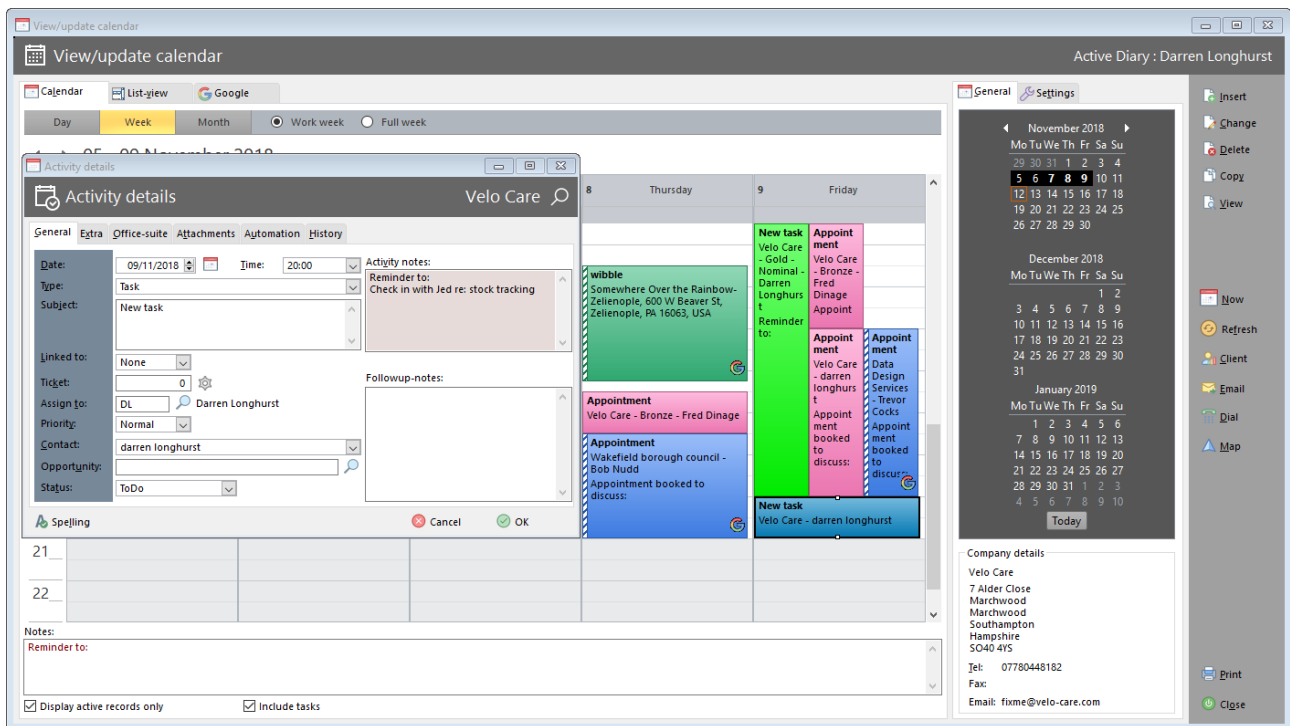
Delivery point activity and status can be viewed as before in the delivery tab of an order.

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.



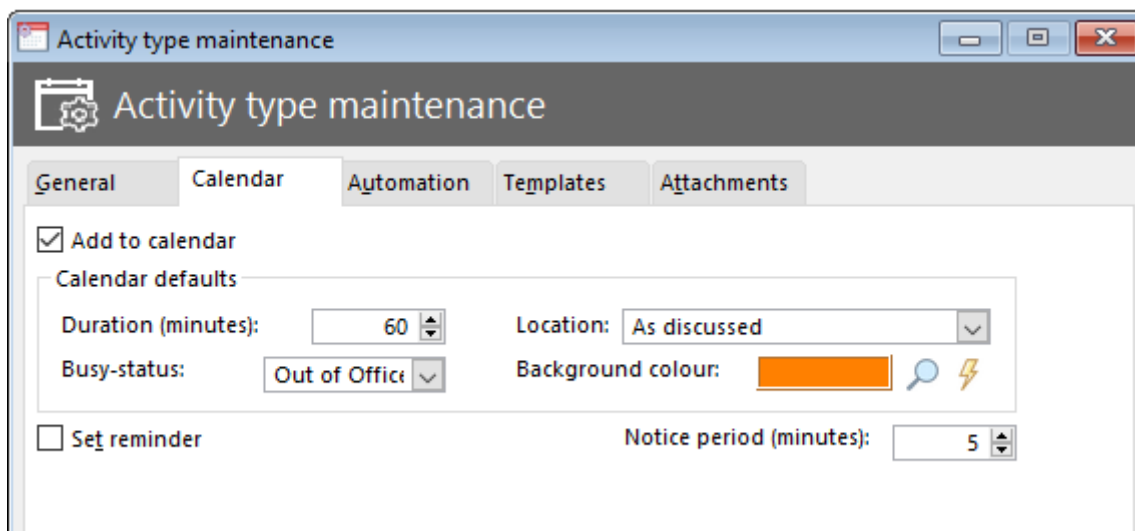
CRM Calendar Filtering

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.

Client maintenance

General Extra Profiling Activities Tickets Opportunities Accounts Invoices Products Defaults Includes Custom

Settings Status Bank

Tag-reg:

Credit limit:

Deposit %:

Factor-ref:

BACS:

Nominal:

Tag-code: ☐ Force tax-code

Company reg:

☐ Enter invoice values using target currency

☐ Use unit price for invoicing

☐ Do not apply commission to any jobs

Override commission plan (ignore rep setting)

Commission plan (offline orders):

Commission plan (online orders):

Account-type:

Terms (no. days/date):

Terms based on:

Settlement wording:

Accounts Ref:

Currency:

Invoicing office:

Service-invoice detail:

Markup profile:

☐ Group orders on one sales-invoice

☐ Group orders on one delivery-note

Cancel OK

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.

Change account status

Change account status

On-stop status

☐ On-stop

☐ Off-stop

☒ Unchanged

On-stop text to display:

☐ Allow override of on-stop message

Account payment-type:

New credit-limit (-1 = unchanged):

Assign new ownership/defaults

Sales-rep is (blank=unchanged):

A/c manager is (blank=unchanged):

Nominal-code is (blank=unchanged):

Tax-code is (blank=unchanged):

Commission override

Apply commission:

☒ Unchanged

☐ Yes

☐ No

New commission plan (offline orders):

New commission plan (online orders):

☒ Email notification to account handler(s) (if applicable)

Cancel OK



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.

☒ User can override on-stop message

☐ Do not apply commission

Commission

Standard commission plan:

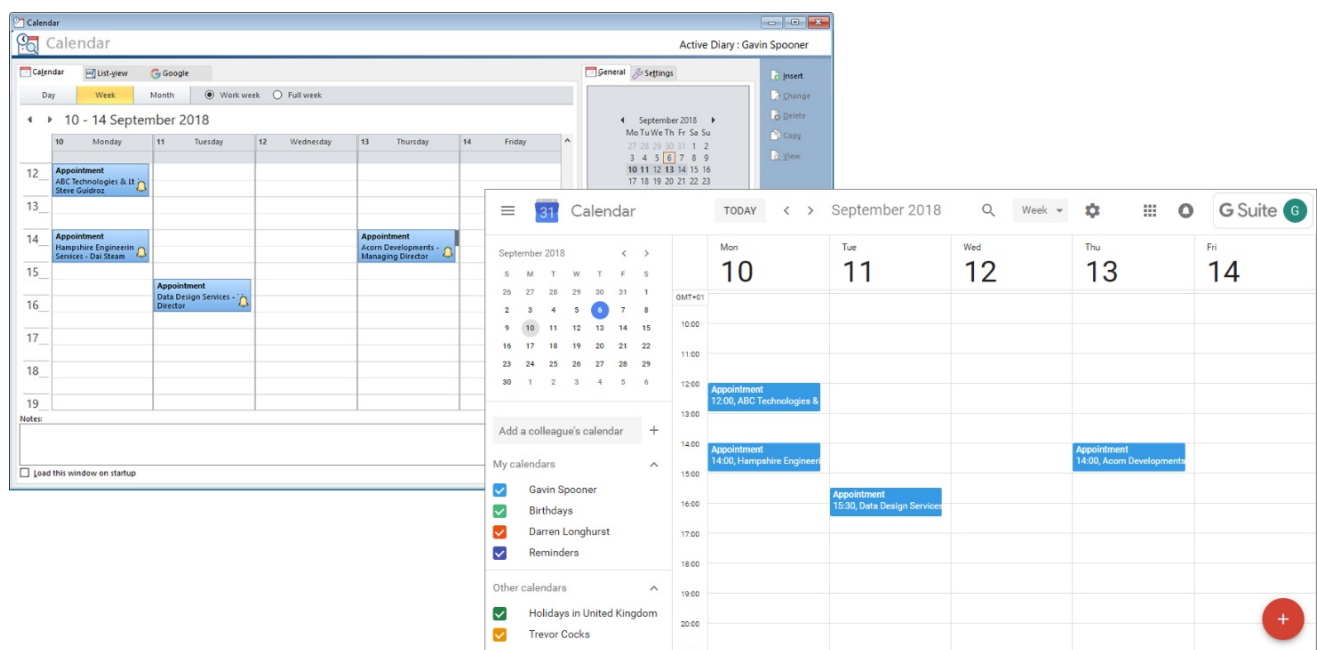
Web commission plan:

☐ User can view commission values

☐ User can change commission values

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.

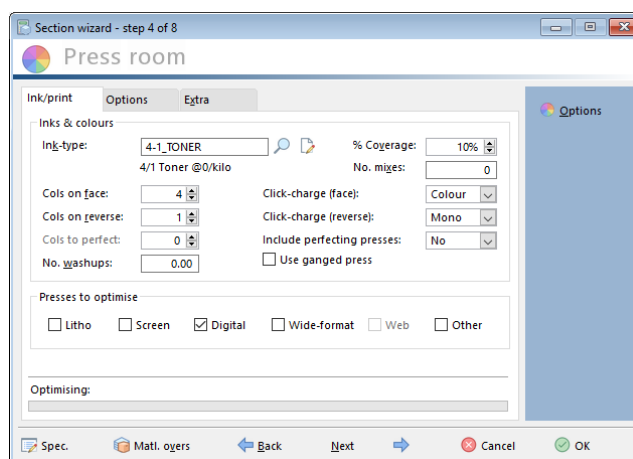
Watch this space for more G-Suite integration in the future!



New Features in Accura Version 5.30 Build 3

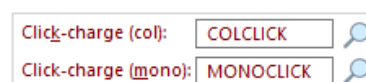
Digital Click Charges

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.

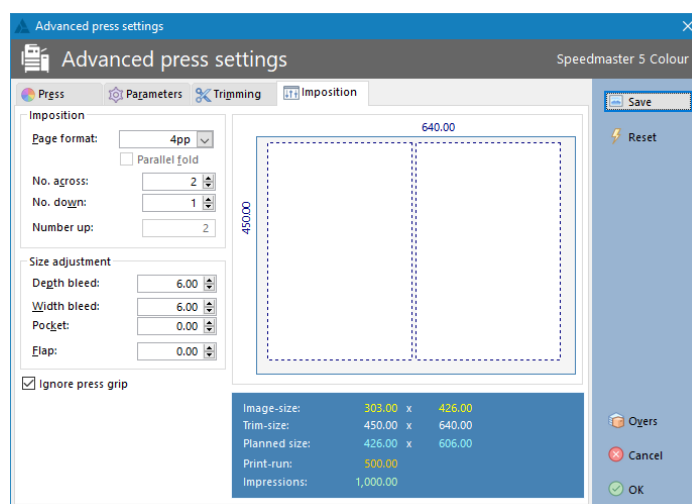


Now, it is possible to select a value for the face and reverse which will then use the digital press's associated click charges appropriately.

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

Update note entry

Subject: Order deposit marked as paid

Document/URL:

Priority: Normal

Notes: Order deposit marked as paid

Display on

| | | | |
|-----------------------------------|---|---|------------------------------------|
| <input type="checkbox"/> RFQ | <input type="checkbox"/> Quote | <input checked="" type="checkbox"/> Order | <input type="checkbox"/> Proof |
| <input type="checkbox"/> Delivery | <input checked="" type="checkbox"/> Invoice | <input type="checkbox"/> P-Order | <input type="checkbox"/> P-Invoice |
| <input type="checkbox"/> Activity | <input type="checkbox"/> Opportunity | <input type="checkbox"/> Ticket | |

☒ Display alert icon

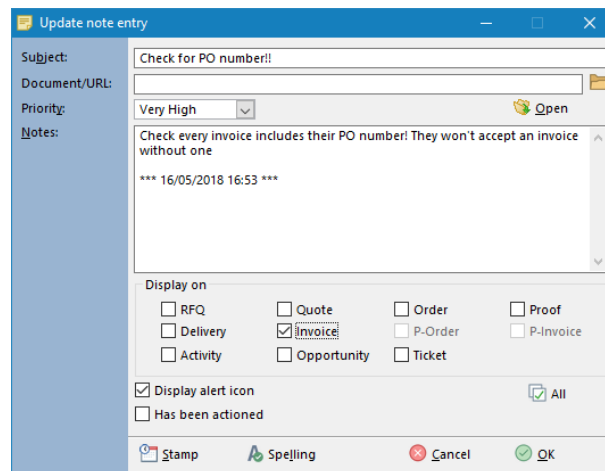
☐ Has been actioned

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



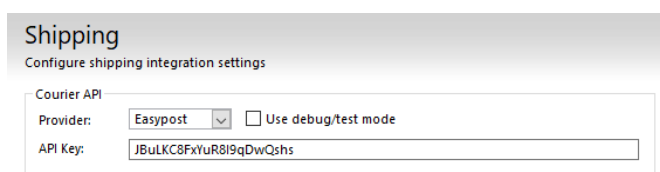
Accura 5.30 introduces a new bolt-on for the standard delivery note and shipping function – integration with EasyPost shipping API. Using this feature will allow you to be able to get accurate shipping prices from your preferred, book your desired service and print approved parcel labels, all without 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](#).

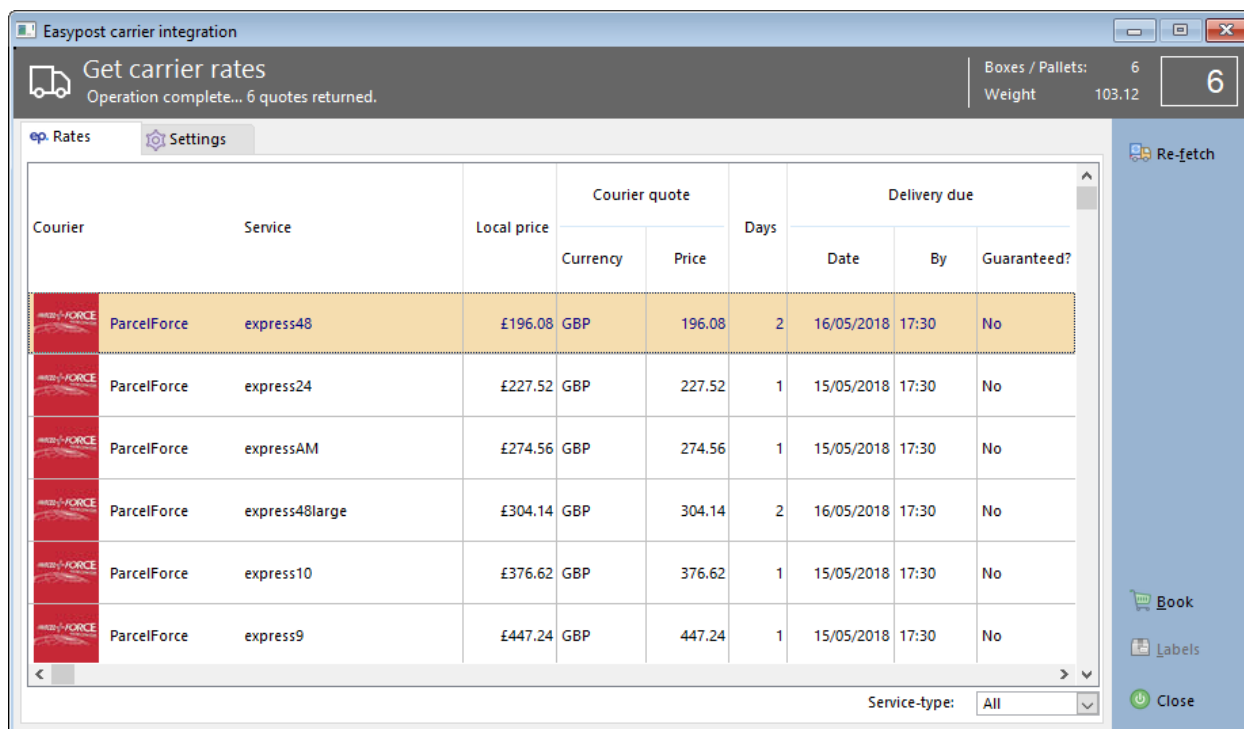
To start you will need an EasyPost account and you should sign-up at this URL –

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.



| Courier | Service | Local price | Courier quote | | Days | Delivery due | | |
|-------------|----------------|-------------|---------------|--------|------|--------------|-------|-------------|
| | | | Currency | Price | | Date | By | Guaranteed? |
| ParcelForce | express48 | £196.08 | GBP | 196.08 | 2 | 16/05/2018 | 17:30 | No |
| ParcelForce | express24 | £227.52 | GBP | 227.52 | 1 | 15/05/2018 | 17:30 | No |
| ParcelForce | expressAM | £274.56 | GBP | 274.56 | 1 | 15/05/2018 | 17:30 | No |
| ParcelForce | express48large | £304.14 | GBP | 304.14 | 2 | 16/05/2018 | 17:30 | No |
| ParcelForce | express10 | £376.62 | GBP | 376.62 | 1 | 15/05/2018 | 17:30 | No |
| ParcelForce | express9 | £447.24 | GBP | 447.24 | 1 | 15/05/2018 | 17:30 | No |

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.

Shipment details

Courier: ParcelForce

Shipping-ref: ER6063088

Service: express48

☐ Closed-out

Tracking URL: <https://track.easypost.com/djE6dHJrX2QyYmM1YzZM3OWMyODRmYmE5OWZiMWU>

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

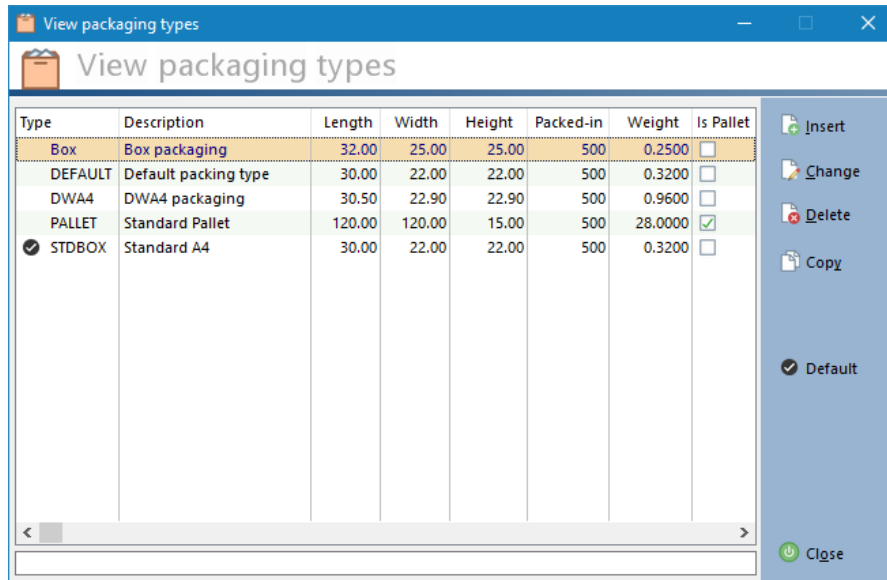
For a more in-depth guide to set-up and functionality, please watch our [EasyPost Integration video](#)

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



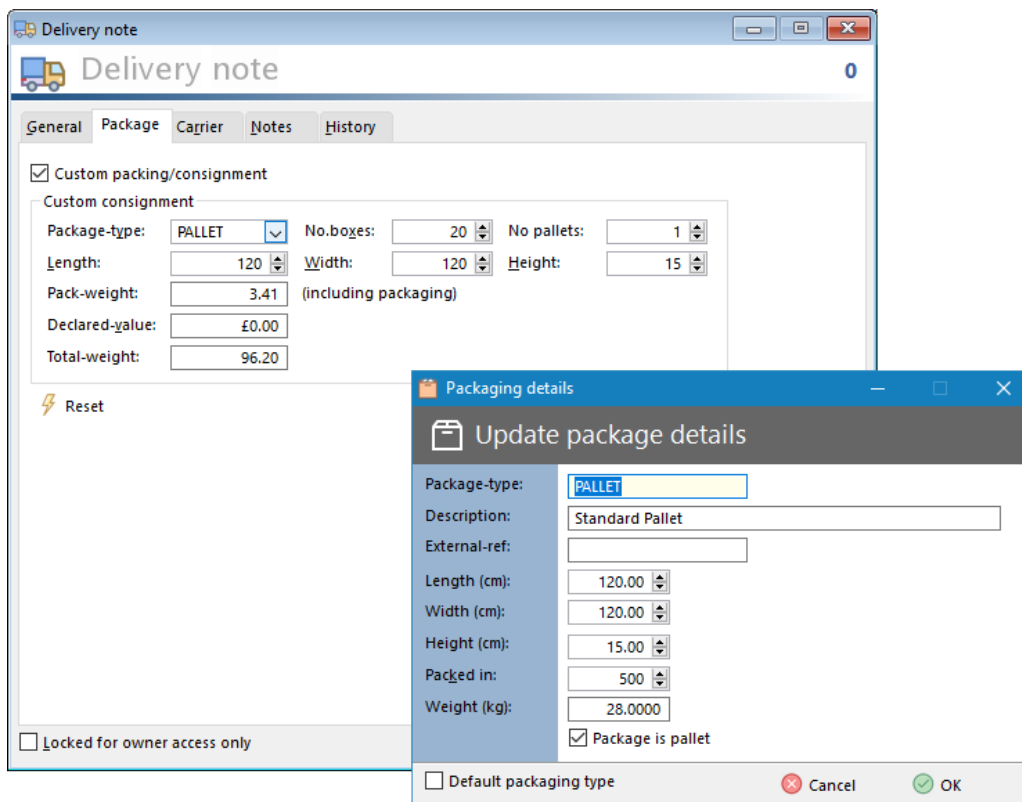
Packaging Settings

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



| Type | Description | Length | Width | Height | Packed-in | Weight | Is Pallet |
|--|----------------------|--------|--------|--------|-----------|---------|-------------------------------------|
| Box | Box packaging | 32.00 | 25.00 | 25.00 | 500 | 0.2500 | <input type="checkbox"/> |
| DEFAULT | Default packing type | 30.00 | 22.00 | 22.00 | 500 | 0.3200 | <input type="checkbox"/> |
| DWA4 | DWA4 packaging | 30.50 | 22.90 | 22.90 | 500 | 0.9600 | <input type="checkbox"/> |
| PALLET | Standard Pallet | 120.00 | 120.00 | 15.00 | 500 | 28.0000 | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> STDBOX | Standard A4 | 30.00 | 22.00 | 22.00 | 500 | 0.3200 | <input type="checkbox"/> |

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



Delivery note

General Package **Carrier** Notes History

☒ Custom packing/consignment

Custom consignment

Package-type: PALLET No.boxes: 20 No pallets: 1

Length: 120 Width: 120 Height: 15

Pack-weight: 3.41 (including packaging)

Declared-value: £0.00

Total-weight: 96.20

Packaging details

Update package details

Package-type: PALLET

Description: Standard Pallet

External-ref:

Length (cm): 120.00

Width (cm): 120.00

Height (cm): 15.00

Packed in: 500

Weight (kg): 28.0000

☒ Package is pallet

☐ Default packaging type

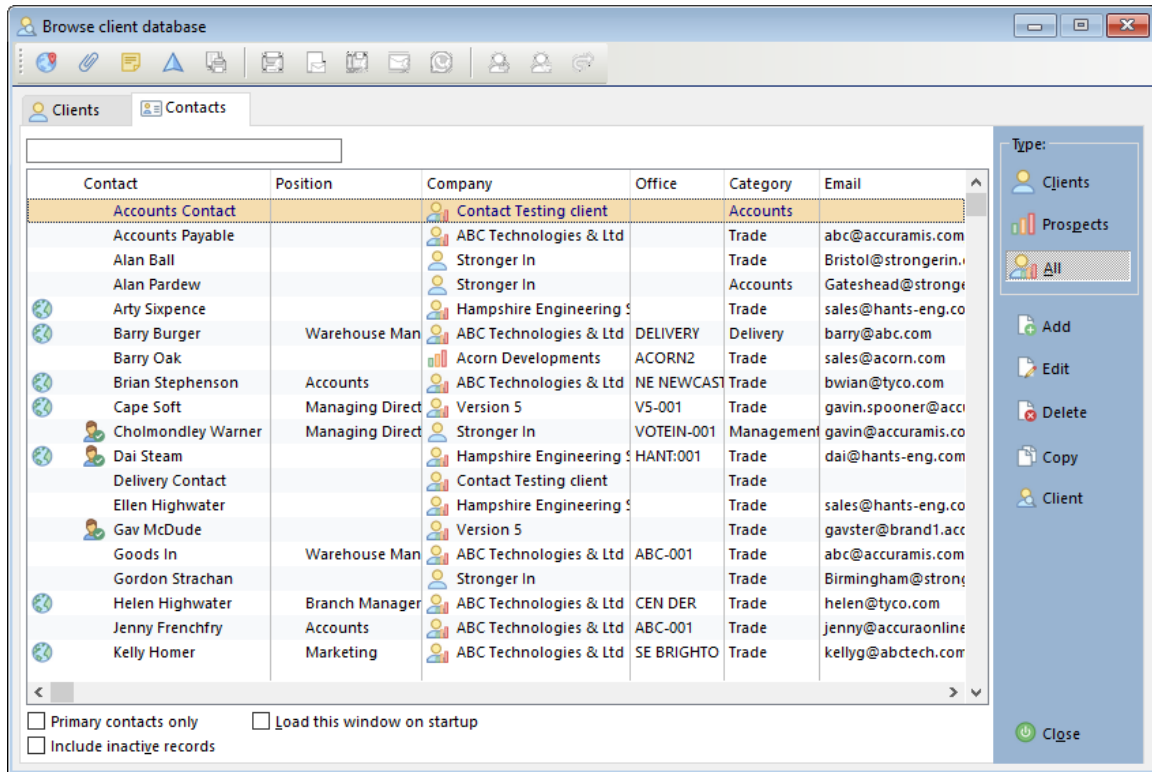
Cancel OK

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.



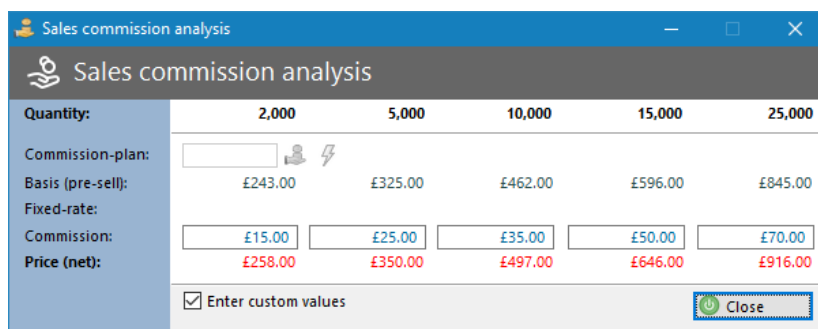
Client Browse

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

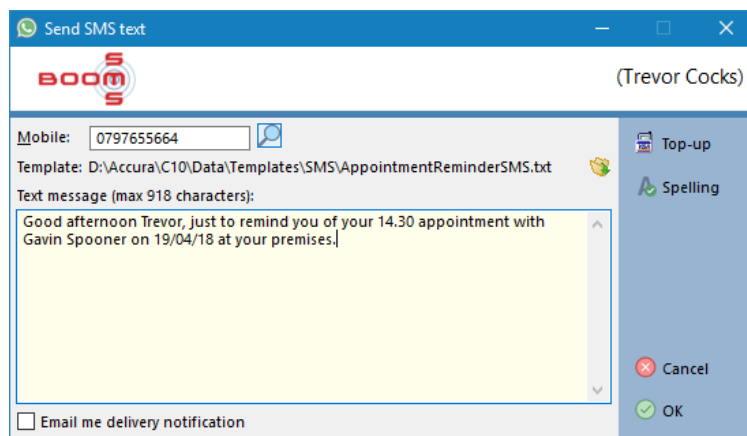
The engine behind the SMS messaging has been replaced with a new, more versatile version allowing us to add some great new functionality.

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.

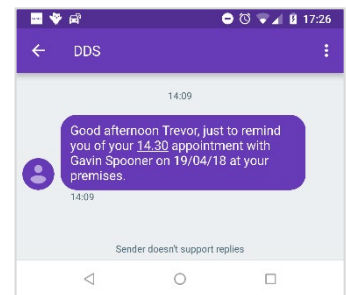
A new feature to the SMS dialog is the ability to be able to select text templates. The templates of course support merge tokens for even quicker entry of data.

The screenshot shows a Windows-style dialog box titled 'Send SMS text'. At the top left is the BoomSMS logo, and at the top right is the name '(Trevor Cocks)'. Below the title bar, there is a 'Mobile:' field with the number '0797655664' and a location pin icon. Next to it is a 'Template:' field showing the path 'D:\Accura\C10\Data\Templates\SMS\AppointmentReminderSMS.txt'. Below these is a 'Text message (max 918 characters):' section with a large text area containing the message: 'Good afternoon Trevor, just to remind you of your 14.30 appointment with Gavin Spooner on 19/04/18 at your premises.' To the right of the text area are buttons for 'Top-up', 'Spelling', 'Cancel', and 'OK'. At the bottom left is a checkbox labeled 'Email me delivery notification'.

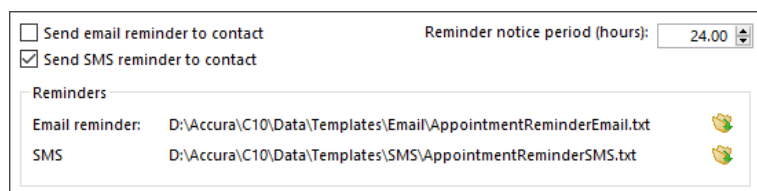
CRM SMS features

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 way 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.

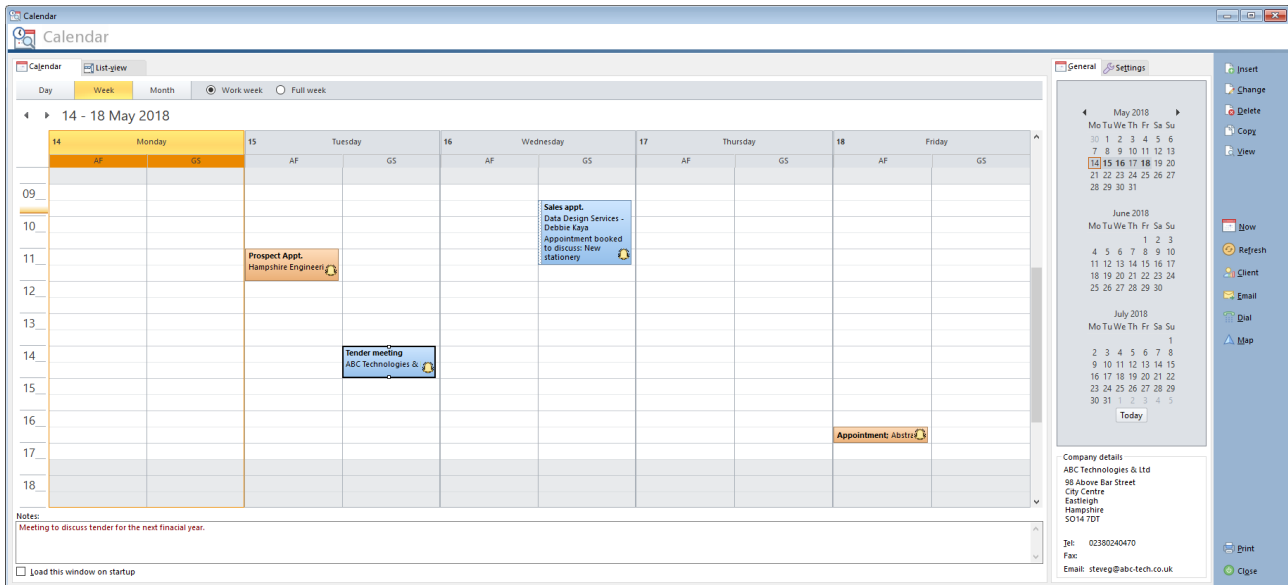


This feature can be switched on in the **Templates** tab of your appointment activity type where you should also select a default SMS reminder template. The reminder SMS will then be sent out in the background at the notice period you've set.

The screenshot shows a dialog box for setting reminders. It has two checkboxes: 'Send email reminder to contact' (unchecked) and 'Send SMS reminder to contact' (checked). To the right of these checkboxes is a 'Reminder notice period (hours):' field with a dropdown menu showing '24.00'. Below the checkboxes is a section titled 'Reminders' which contains two rows: 'Email reminder:' with the path 'D:\Accura\C10\Data\Templates\Email\AppointmentReminderEmail.txt' and 'SMS' with the path 'D:\Accura\C10\Data\Templates\SMS\AppointmentReminderSMS.txt'. Each path has a small icon to its right.

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.

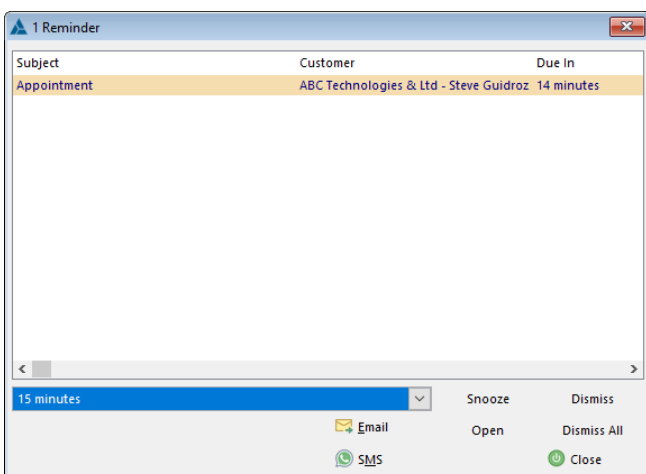
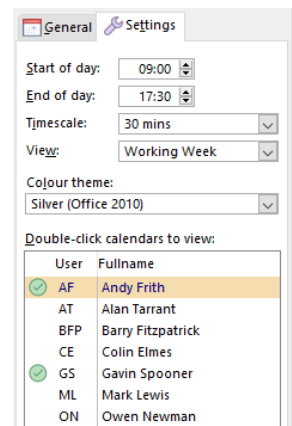


It is now easier to see other user's Calendar dates by selecting the calendars you need to view. You can see many user's calendars side by side or just your own.

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.

Purchase order 1,057

General Delivery Extra Attachments History

Deliver to:

☐ Client ☐ Supplier ☒ Job ☐ Other

Client: ABC Office: SC LIV

Contact: Kevin Forsyth

Name: Tyco Scotland

Address: Almondvale House
Alderstone Road
Livingston
East Lothian
EH54 7DN

Delivery notes:

Please delivery directly to our customer using UNMARKED boxes.

Reset

☐ Output job artwork file(s)

Cancel OK

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.

☒ Assign delivery address from job to purchase-order



New Features in AccuraOnline 5.30

Advanced Filter Settings

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

The screenshot displays the AccuraOnline 5.30 Store interface. At the top, there's a navigation bar with social media icons (Facebook, Twitter, Google+, LinkedIn) and a user greeting 'Welcome Gavin!'. Below this is a dark header with the 'Abstract Group' logo, contact information (Call Us: +44 (0)23 8024 0470, Fax Us: +44 (0)23 8025 2573, Email Us: sales@accuramis.com), and a shopping cart icon. The main navigation bar includes links for HOME, QUOTES, ORDERS, PROOFS, STORE (highlighted), and CONTACT US. The 'Products' section features a search bar, a 'Sort by' dropdown set to 'Product Code: A-Z', and a 'View as' toggle. On the left, there are two filter panels: 'Stock Type' with a 'Stationery' checkbox, and 'Brand' with an 'Abstract Group' checkbox. The main product grid shows three items: 'ABS_C4_ENV (Stationery)' priced at £51.63 each (2250 in stock), 'ABS_COMP (Stationery)' priced at £12.23 each (6000 in stock), and 'ABS_DL_ENV (Stationery)' priced at £33.09 each (1000 in stock). Each product card includes a 'View Details' button.

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.

The screenshot shows the 'Product Filters' configuration page. It contains six filter settings arranged in a 2x3 grid. Each setting has a title field, a filter name field, an 'enabled' checkbox, and a 'Locations filter enabled' checkbox. The filters are: Sub-category filter title (Stock Type), Colour filter title, Size filter title, Group filter title (Brand), Finish filter title, and Locations filter title. The 'Sub-category filter enabled' and 'Group filter enabled' checkboxes are checked, while the others are unchecked.

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.

Price-list maintenance

Code: ABC

Description: Price list for ABC

Expiry date: 06/05/2028 At: 23:59

Defaults for new products

Rate-type: ☐ % Discount ☒ Adjustment ☐ Sell-rate

Adjust (+/-): £-5.00

| Code | Description | Rate-type | Rate-value | Sell-rate | New-rate | Per | Created |
|--------|---------------------------------|------------|------------|-----------|----------|-----|------------|
| TYC001 | Letterheads - Market Harborough | Discount | 10.00% | 80.5219 | £72.47 | 500 | 09/05/2018 |
| TYC002 | Letterheads - Aberdeen | Discount | 10.00% | 106.2889 | £95.66 | 500 | 09/05/2018 |
| TYC003 | Letterheads - Skelmersdale | Discount | 10.00% | 59.0494 | £53.14 | 500 | 09/05/2018 |
| TYC005 | Compliment Slips | Discount | 10.00% | 59.0494 | £53.14 | 500 | 09/05/2018 |
| TYC010 | Business Cards | Discount | 10.00% | 12.8835 | £11.60 | 250 | 09/05/2018 |
| TYC020 | Sales Order Sheet | Discount | 10.00% | 13.4204 | £12.08 | 500 | 09/05/2018 |
| TYC021 | Purchase Order Sheet | Discount | 10.00% | 14.9771 | £13.48 | 500 | 09/05/2018 |
| TYC022 | Statement Sheet | Discount | 10.00% | 15.0308 | £13.53 | 500 | 09/05/2018 |
| TYC030 | Order Folder - Orange | Adjustment | £-5.00 | 20.6136 | £15.61 | 100 | 09/05/2018 |
| TYC031 | Order Folder - Blue | Adjustment | £-5.00 | 40.2610 | £35.26 | 100 | 09/05/2018 |
| TYC032 | Yellow Folder | Adjustment | £-5.00 | 83.7428 | £78.74 | 100 | 09/05/2018 |

Rate-type: All

Cancel OK

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.

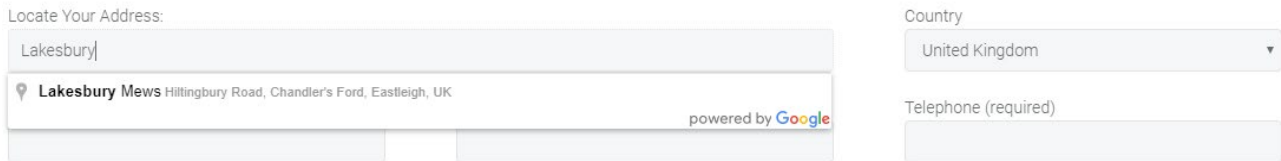
Multiple clients can belong to a single pricelist but a client can only belong to one price list. If a client is selected into a second pricelist, this will override the original selection. In addition to the Clients tab of the price list maintenance browse, you can view and select a pricelist from the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

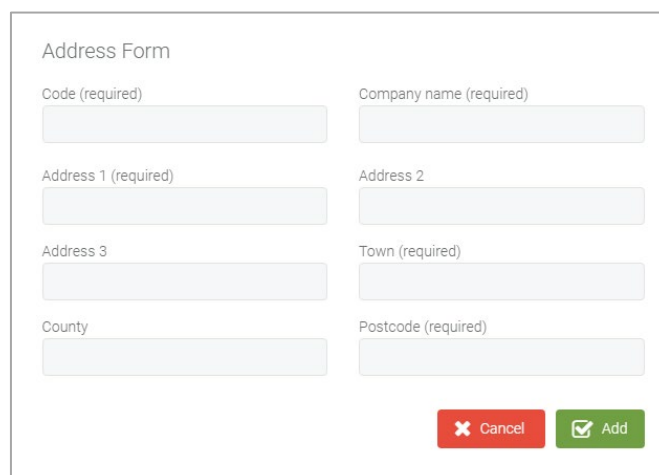
When you have a Google account, you will need to sign-up for a Maps API key which you can do [here](#). Once done you will be given an API key which looks similar to this format - *AlzaSyXXXXXXXXXXXXXXXXXXXXXXXXXXXX*. This key should then either be entered into Accura through the Setup - System settings 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 which 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 Google 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.

| Delivery and Invoice Permissions | General Account Permissions |
|---|--|
| <input checked="" type="checkbox"/> View billing address in requests | <input type="checkbox"/> View data owned by other accounts |
| <input checked="" type="checkbox"/> Edit billing address in requests | <input type="checkbox"/> Approve order requests |
| <input checked="" type="checkbox"/> Edit delivery address in requests | <input type="checkbox"/> View prices |
| <input type="checkbox"/> View invoice PDFs in orders | <input checked="" type="checkbox"/> Manage addresses (offices) |
| <input type="checkbox"/> View delivery note PDFs in orders | |

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.

